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NATIONAL INSTITUTES OF HEALTH
BUSINESS & RESEARCH SUPPORT SYSTEM

# Basics of Oracle Navigation

**Student Guide**

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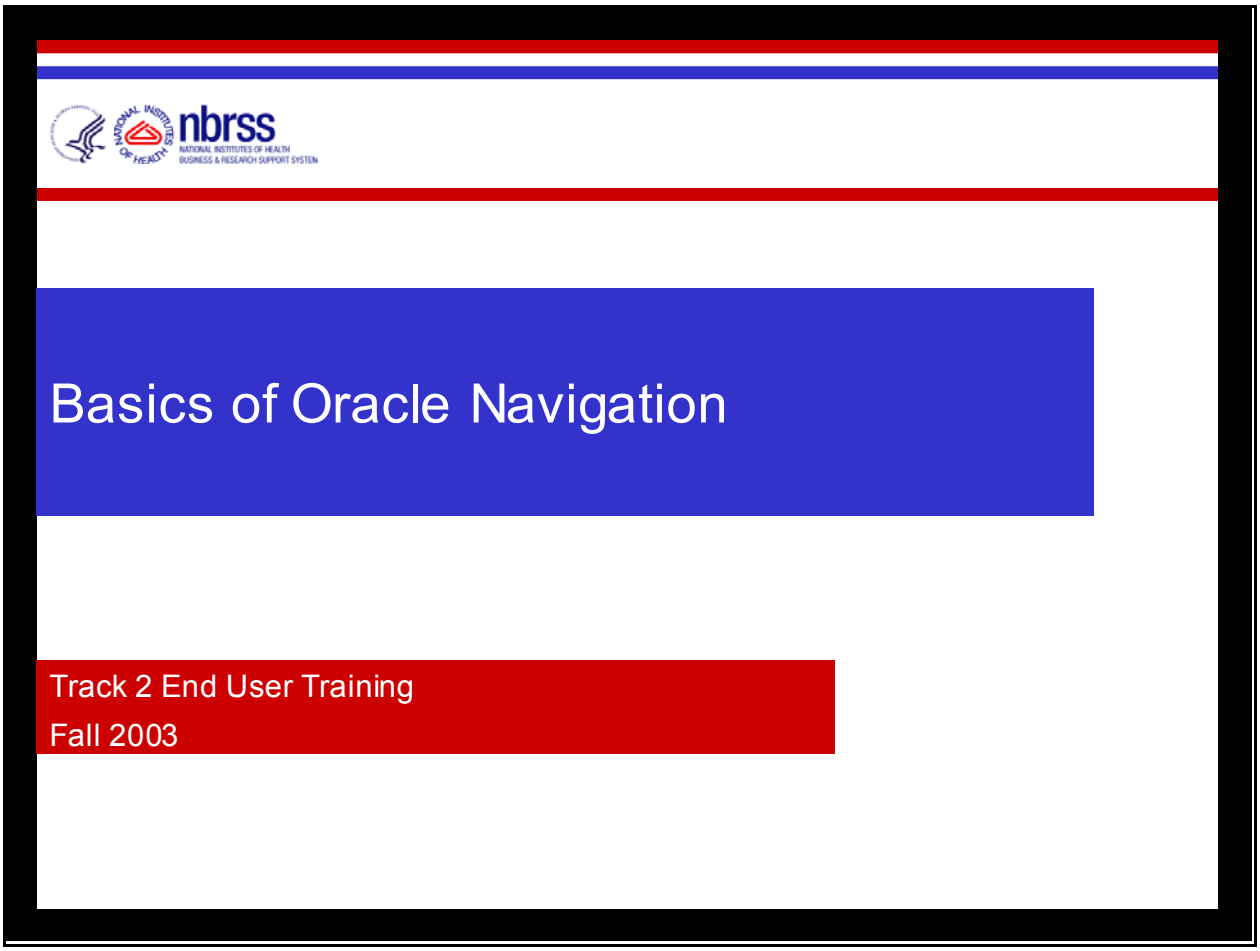
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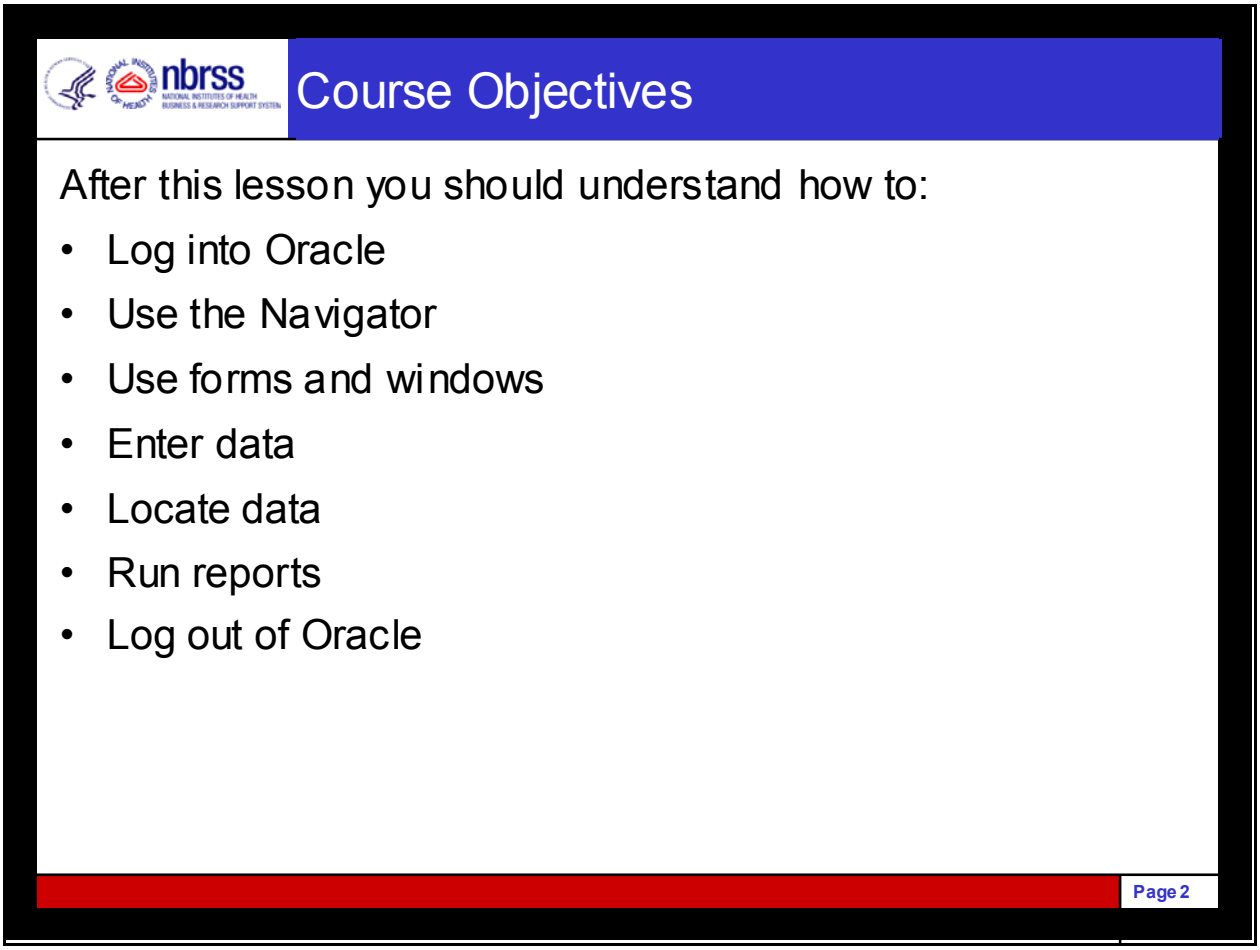
NATIONAL INSTITUTES OF HEALTH
BUSINESS & RESEARCH SUPPORT SYSTEM
Basics of Oracle Navigation
Track 2 End User Training
Fall 2003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Course Objectives
After this lesson you should understand how to:
• Log into Oracle
• Use the Navigator
• Use forms and windows
• Enter data
• Locate data
• Run reports
• Log out of Oracle
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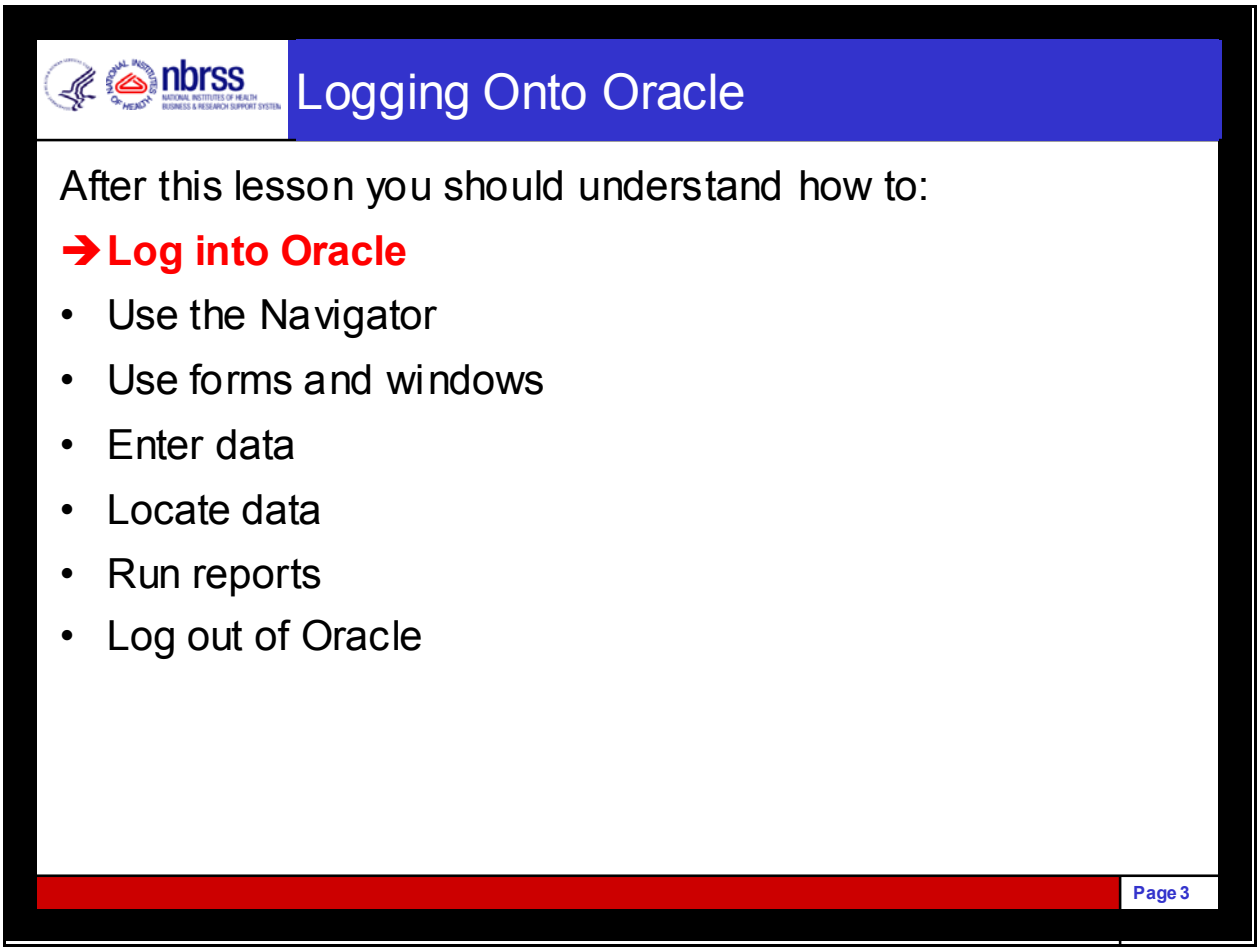
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Logging Onto Oracle
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## Accessing Oracle via the NIH Portal

- Oracle is a web-based application available via the NIH Portal
- NIH Portal website: **http://my.nih.gov**
  - To Log on use your:
    - NIH Domain
    - User Name
    - Password
  - For assistance, contact NIH Help Desk at 6-HELP (301.496.4357)
- Add the Budget & Finance Community, which is the page where the Oracle application resides


- Select the **NBS Production** link to launch the application.

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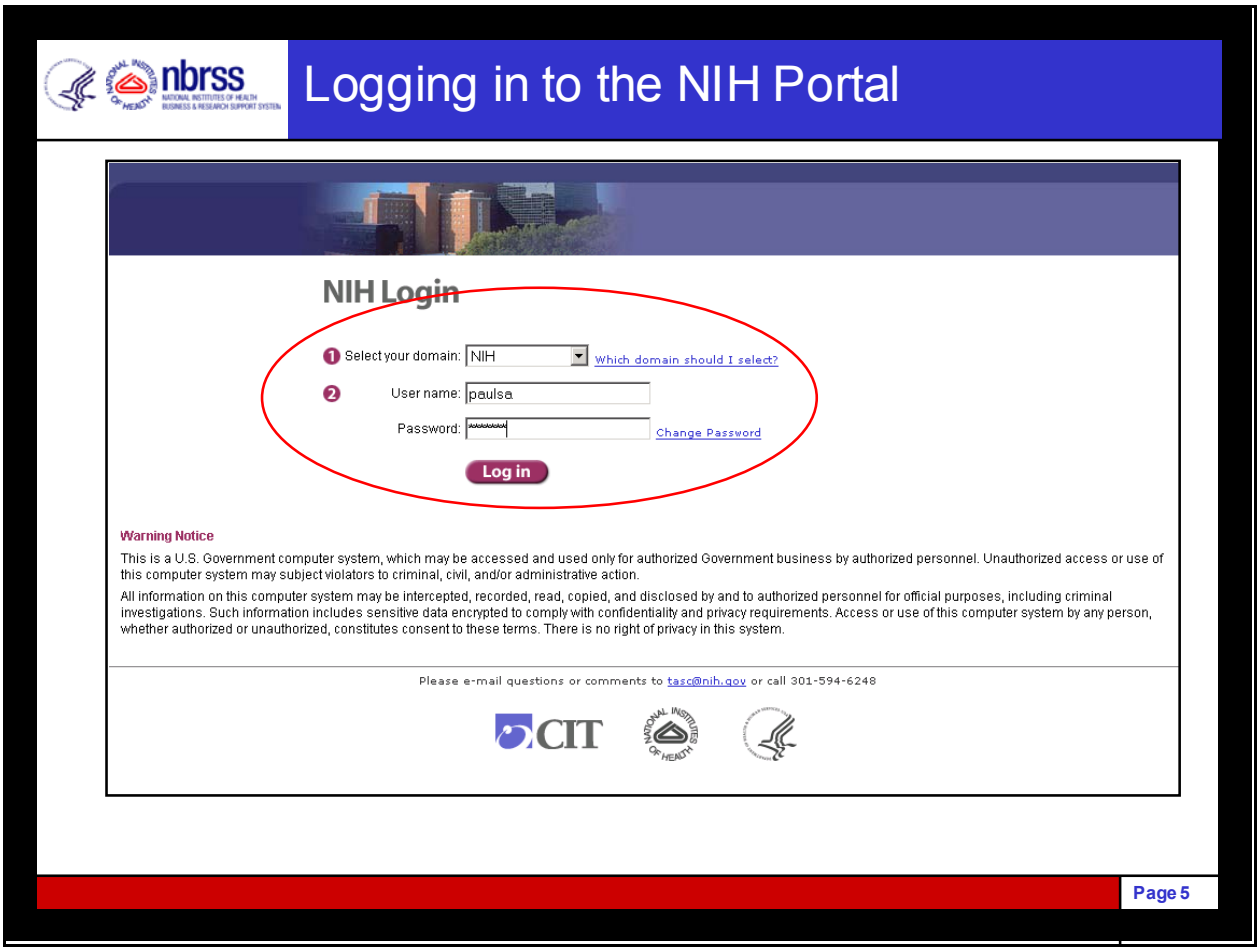
# Logging in to the NIH Portal




**Follow the steps below to access the NBS Travel System application from the NIH Portal.**

- Launch Internet Explorer. In the browser, navigate to the NIH Portal at http://my.nih.gov. (Note: If you need Internet Explorer installed on your computer, please contact the NIH Help Desk at 6-HELP (301-496-4357))
- Log onto the NIH Portal according to the steps listed below, using the account information you currently use to log on to Windows at your workstation.
    - Select your **domain** from the pull-down menu. (Hint: Use the "Which domain should I select? link for assistance.)
    - Enter your **User Name**.
    - Enter your **Password**.
    - Click the **Log in** button.

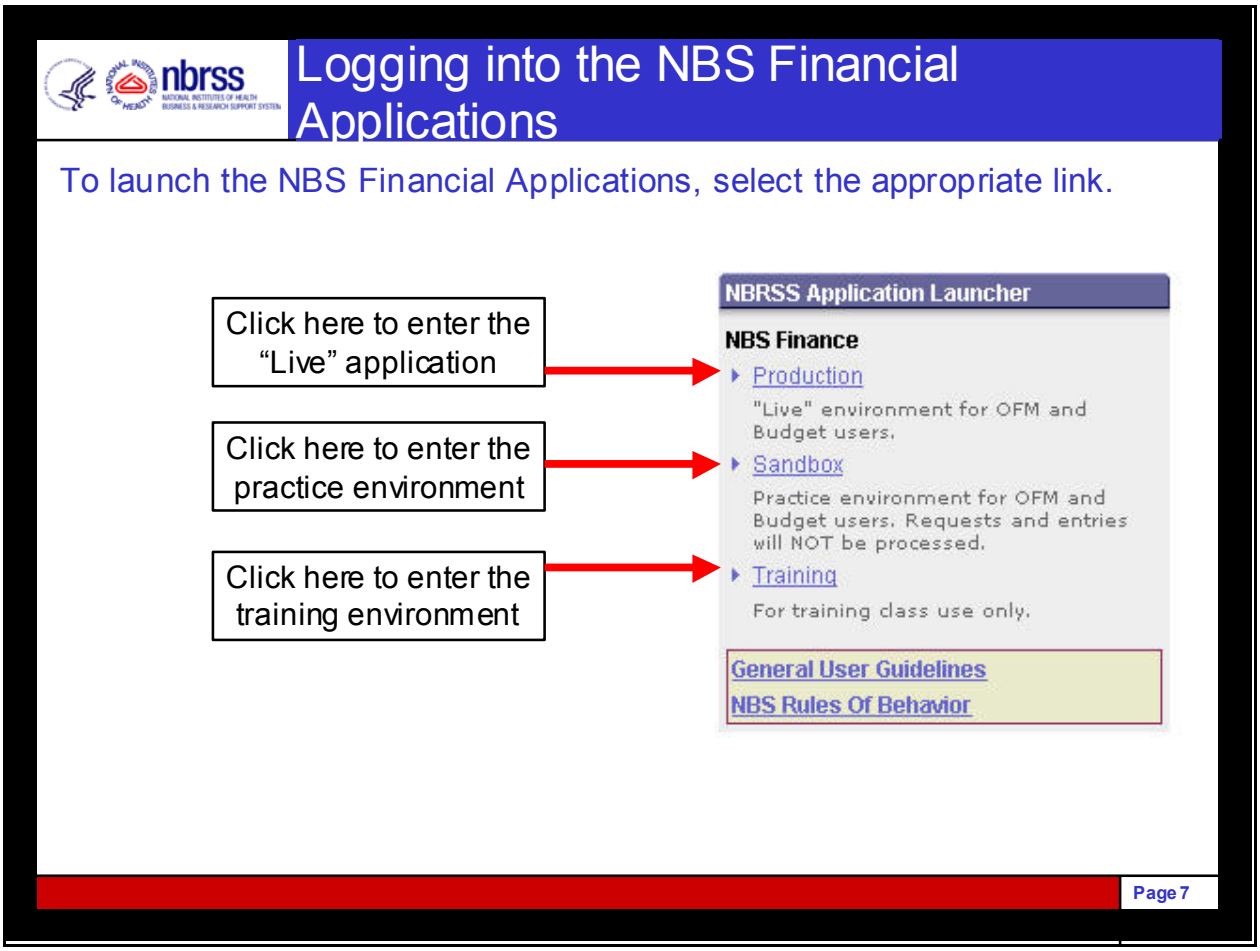
For Portal account and password assistance, contact the NIH Help Desk at 6-HELP (301-496-4357)

# Adding a Community to your NIH Portal View


**What is a Portal Community and how do I subscribe to a Portal Community?**

Portal Communities provide content, documents and application access to users who have a common area of interest. Once you subscribe to a community, it will appear in the list on your Communities tab every time you visit the NIH portal. Follow the steps below to subscribe to a community.

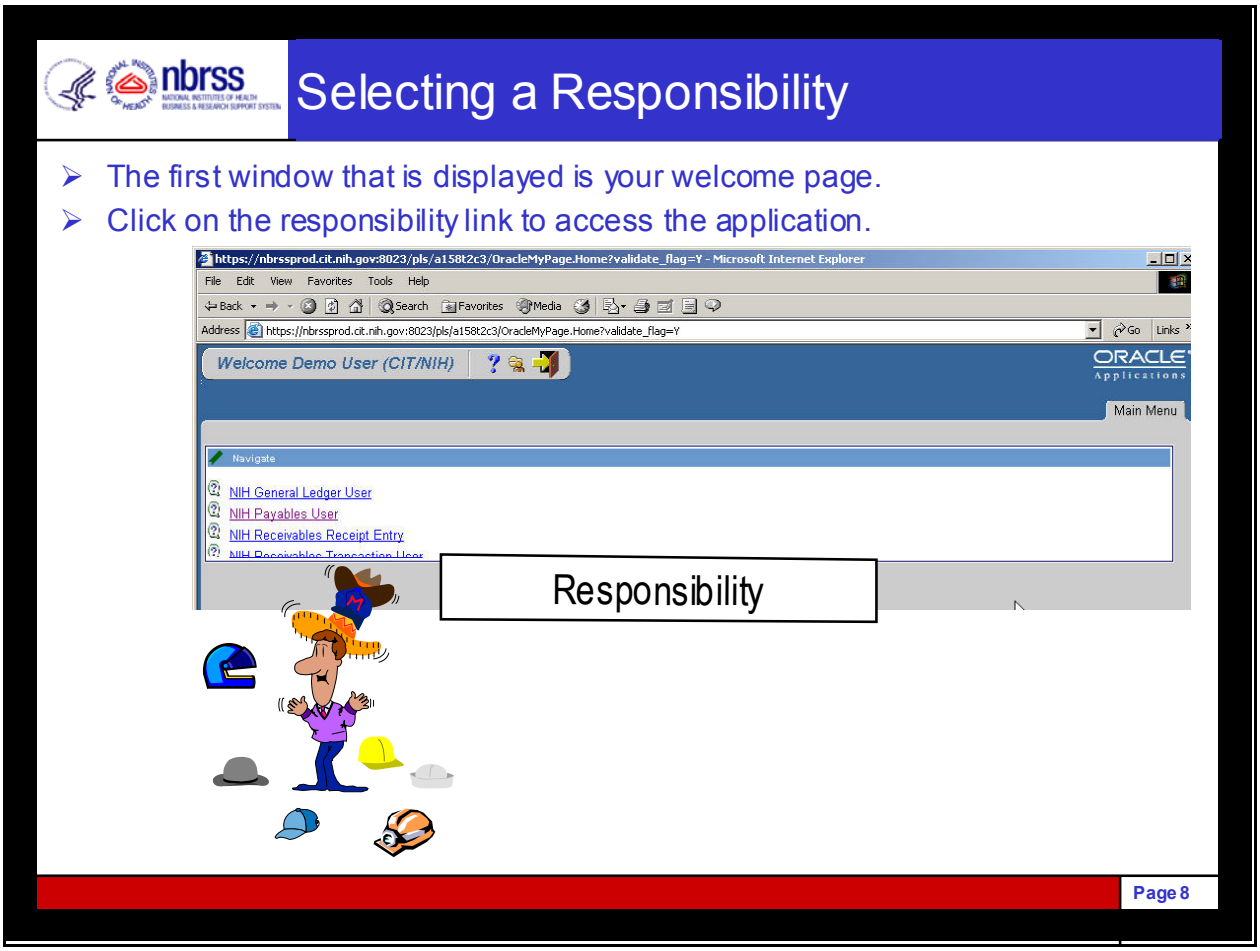
- Click on the "**Communities**" tab and select "**Edit Your Memberships**".
- **Locate a community** of interest either by clicking a folder to browse for communities or by entering a key word in the Search field and clicking "Go" to look for a specific community.
- Once you locate a community of interest, **select it** by clicking in the box next to the community name.
- Click "**Add to my Memberships**". (You may need to select your default community.)
- Click "**Finish**". The subscribed community will now appear in the list on your "Communities" Tab every time you access the portal.




Use the **Production** link to enter the live environment. Only use this link if you are going to perform real work in the system. You should not "practice" here.

Use the **Sandbox** link to enter a practice environment. This environment was created to allow you to practice your skills outside the training classroom. The information entered here will not affect the financial reporting of the NIH.

Use the **Training** link to enter the oracle application for use during training classes. Do not use this link if you are not in an instructor lead class.



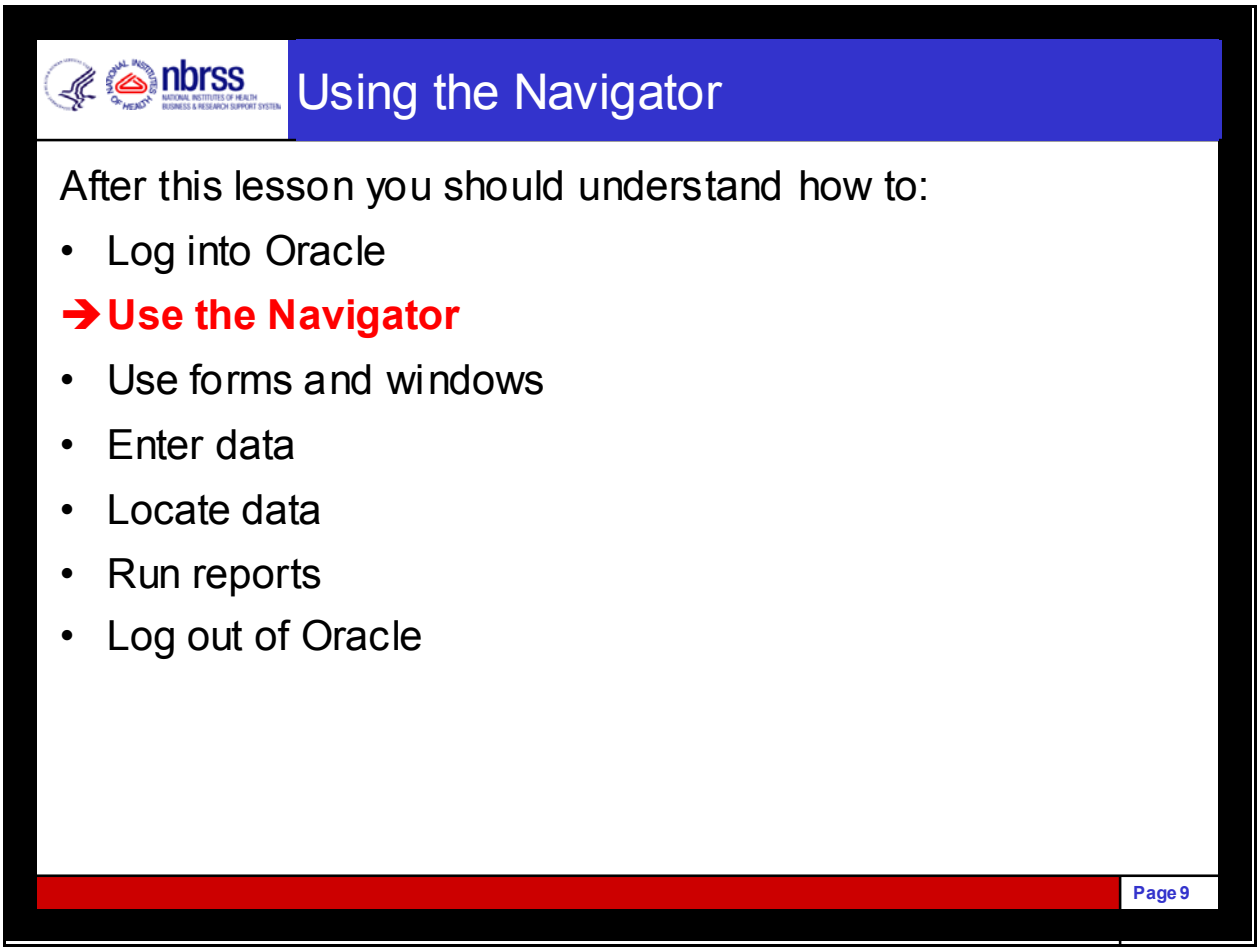

Selecting a Responsibility

Once you have used the logon form to begin the logon process, you must tell the system what type of access you will be using. A *responsibility* is a set of data, menus, and forms that defines your particular level of authority while using the system. For example, you would want the Accounts Payable department of your company to access the invoice forms of the system, but you would not want them to be able to access any payroll information. Another example is that the controller of a department would want to have access to all the data that his or her employees can use, so the controller would want access to both accounts payable and payroll information.

Responsibility Assignments

Each user has at least one responsibility and several users can share the same responsibility. Your OFM Manager can assign you any of the NIH responsibilities within the NBS. If you have only one responsibility with one function, and only one region on your Personal Homepage, you will go directly to that function.

If you have multiple responsibilities, select the underlined link in the Application section to select the desired responsibility.  Once you click on the link, you will have an opportunity to change responsibilities.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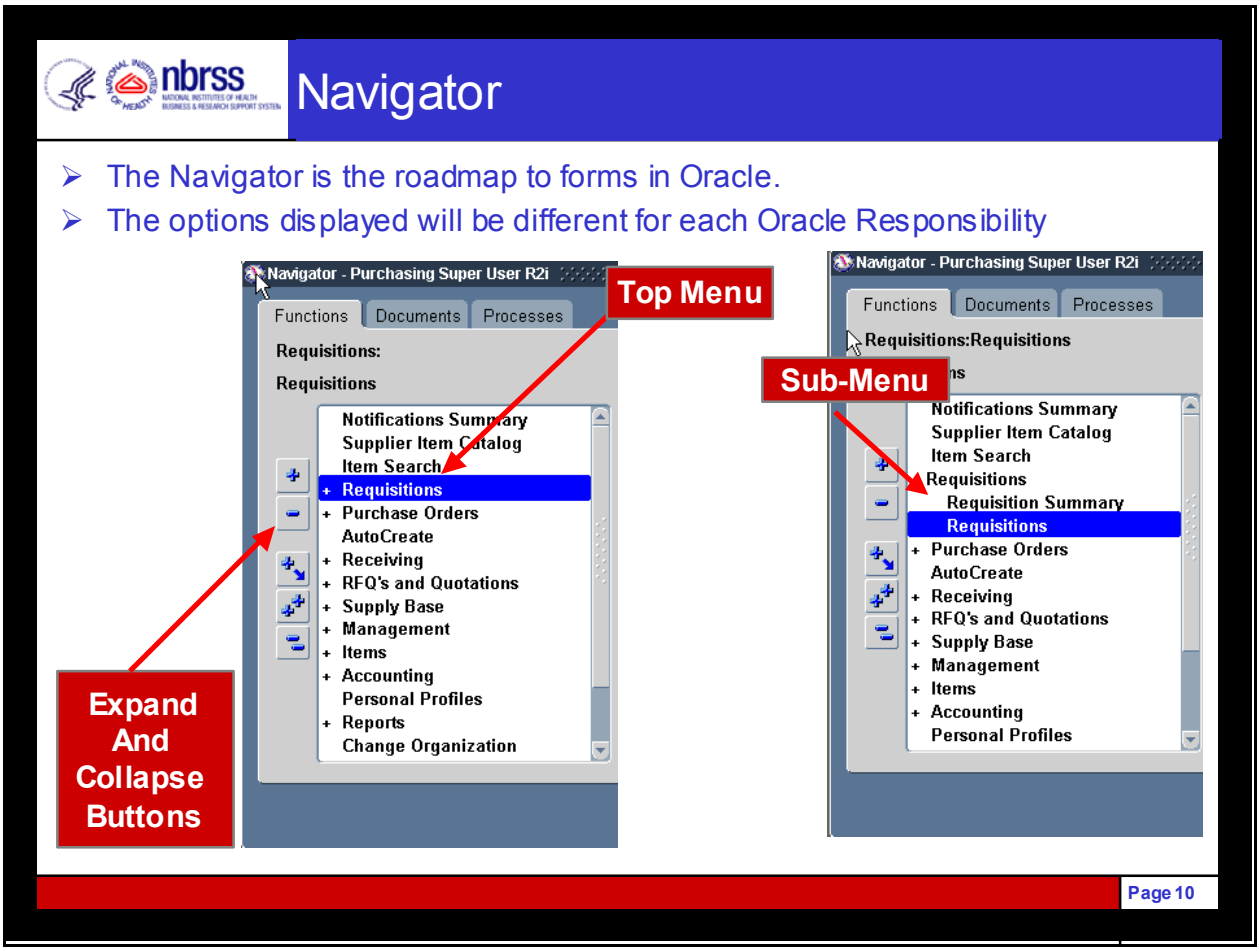



**The Navigator Window**

Use the Navigator window to navigate to a form that lets you perform a specific business activity. You can navigate to the forms that are displayed in a navigation list on the left side of the Navigator window. The Navigator window is always present during your session of Oracle Applications and displays the name of your current responsibility in its window title.

**Using the Navigation List**

Each user can access the Oracle Applications forms in several ways so that they can use the system quickly, according to their own computer style. Use the various buttons on the Navigator to manipulate list items.

Choose one of the following methods to expand an item to its next sublevel form:

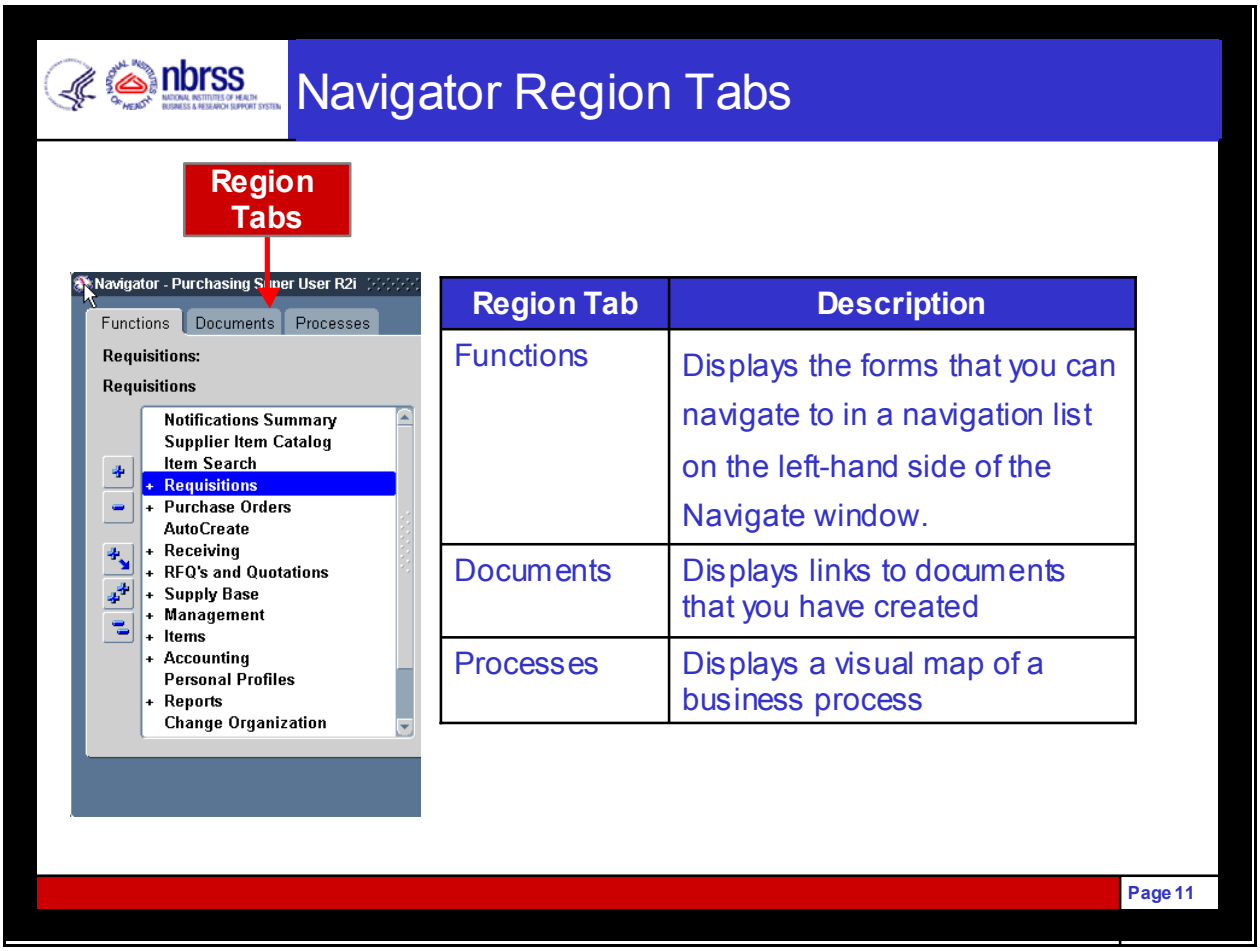
- Double-click the item.
- Select the item and choose Open.
- Select the item and choose Expand (Plus Button).

To collapse an expanded item, select the item and choose Collapse (Minus Button).

To expand or collapse several items at once, choose one of the following buttons:

- Expand All Children (Plus with down arrow)expands all the sublevels of the currently selected item.
- Expand All (Double Plus) expands all the sublevels of all expandable items in the navigation list.
- Collapse All (Double Minus) collapses all currently expanded items in the navigation list.

# Navigator Region Tabs




The Functions tab displays all of the applications functions that you can access for the responsibility that you selected.

If you have a document, such as a particular purchase order, invoice, or sales order that you want to access later, you can create a link to the document using the Navigator's Document feature.

The Navigator's Document feature allows you to create as many links as you want and save them in the Documents region of the Navigator window. When you use a link to open a document, Oracle Applications opens the document in the appropriate form window. You can access the Document region using the tab control.

The Processes region of the Navigator (the "Process Navigator") automates business flows across Oracle Applications forms. It allows you to model and execute complex business processes through an easy-to-use, graphical user interface.

The Process Navigator guides you step-by-step through each required function in a business process. In addition to providing a visual map of a business process, the Process Navigator can launch the appropriate Oracle Applications forms or standard reports at each step.

**Important**: The Process region displays standard oracle processes and does not reflect NIH specific business processes.


Using the Top Ten List

If there are forms that you use frequently, you can add them to a navigation top ten list located on the right side of the Navigator window. The top ten list displays your forms numerically so you can choose them instantly without having to search for them in the navigation list. You can add a maximum of ten forms to the top ten list and you can create a different top ten list for each responsibility for which you have access. A top ten list is unique for the responsibility and user sign-on combination that you use.

How to Create a Navigation Top Ten List

1. Select a frequently used form from the navigation list by highlighting it in the Navigator window.

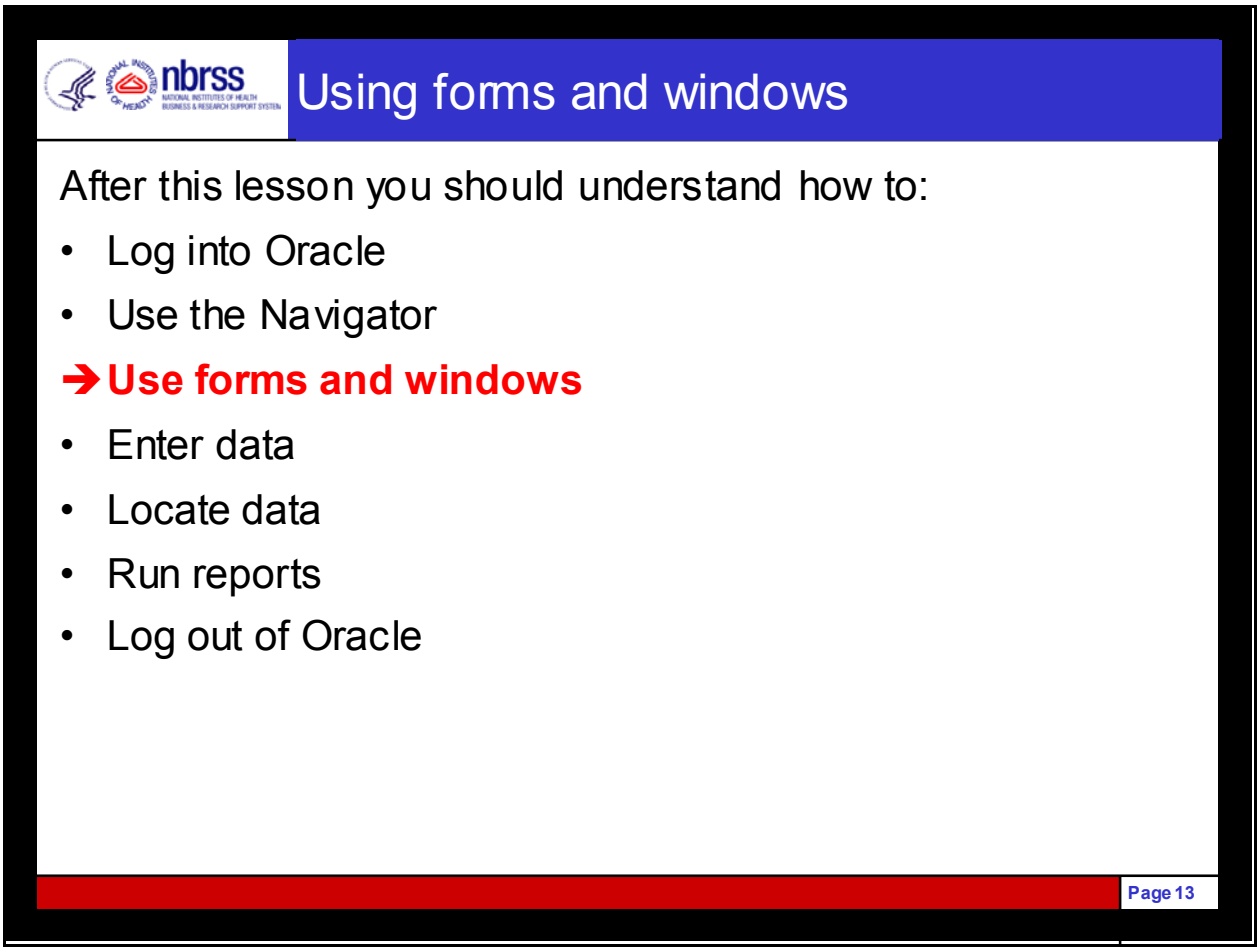
2. Click the right pointing arrow to add that form to the top ten list.

3. Click the left facing arrow to remove a form from your top ten list.

4. To open a form in your top ten list, type the number that precedes the form you want to open. You can also click on it and press Open, or double-click on it.

> Note: Sometimes the form that you add changes names when it appears in the top ten listing. An example is that Suppliers becomes Vendors, or Orders, Returns becomes

Order Workbench. Also note that the tenth entry is numbered 0 (zero), so it can be invoked by pressing a single keystroke also.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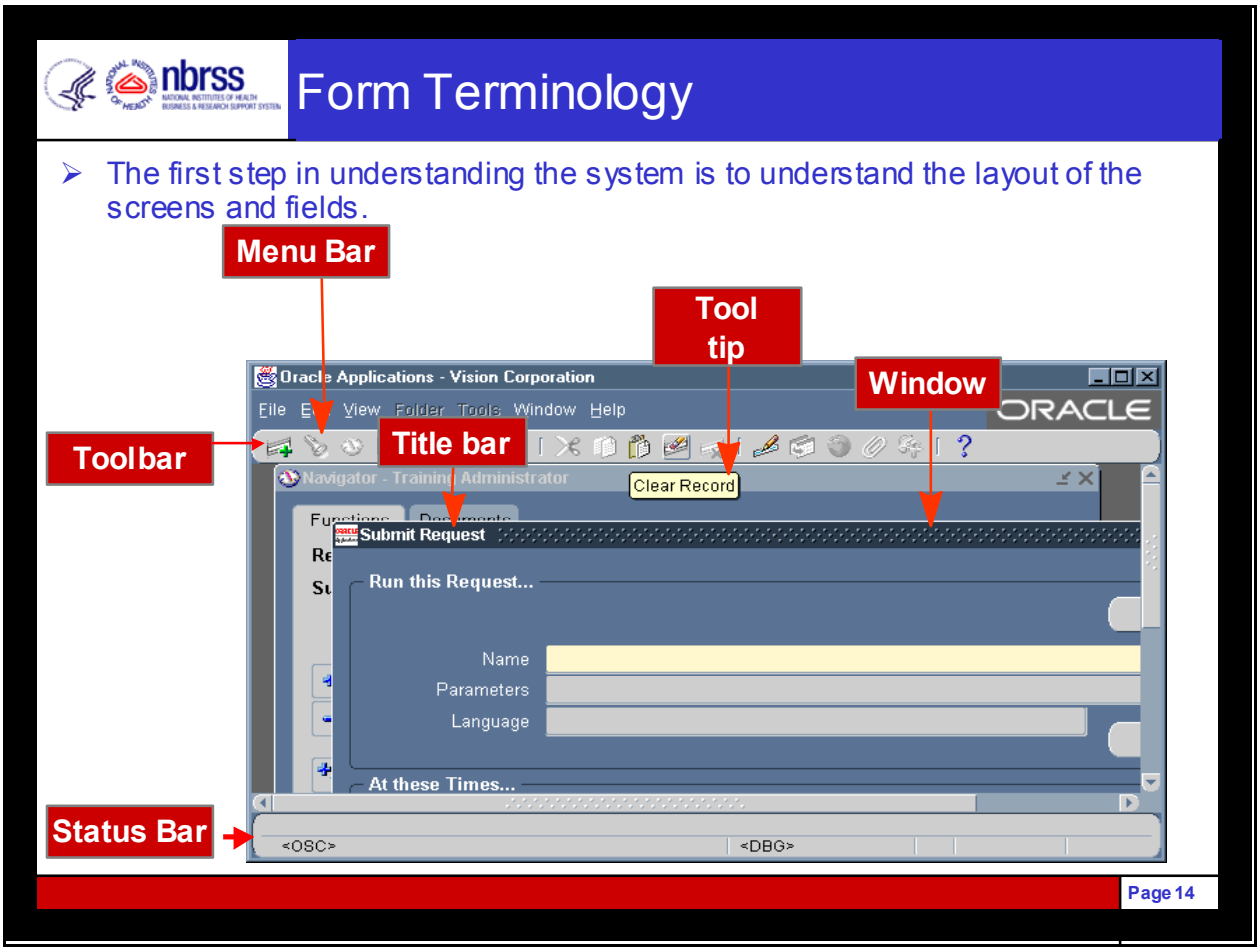



**Form Terminology**

Oracle Applications Release 11*i* works specifically in a Web-enabled environment. It is important to understand the terminology of the components within an Oracle Applications form. Common terms used in Oracle Applications forms are listed below.

Menu bar—Use pull-down menus from this menu bar to navigate or perform actions within a form

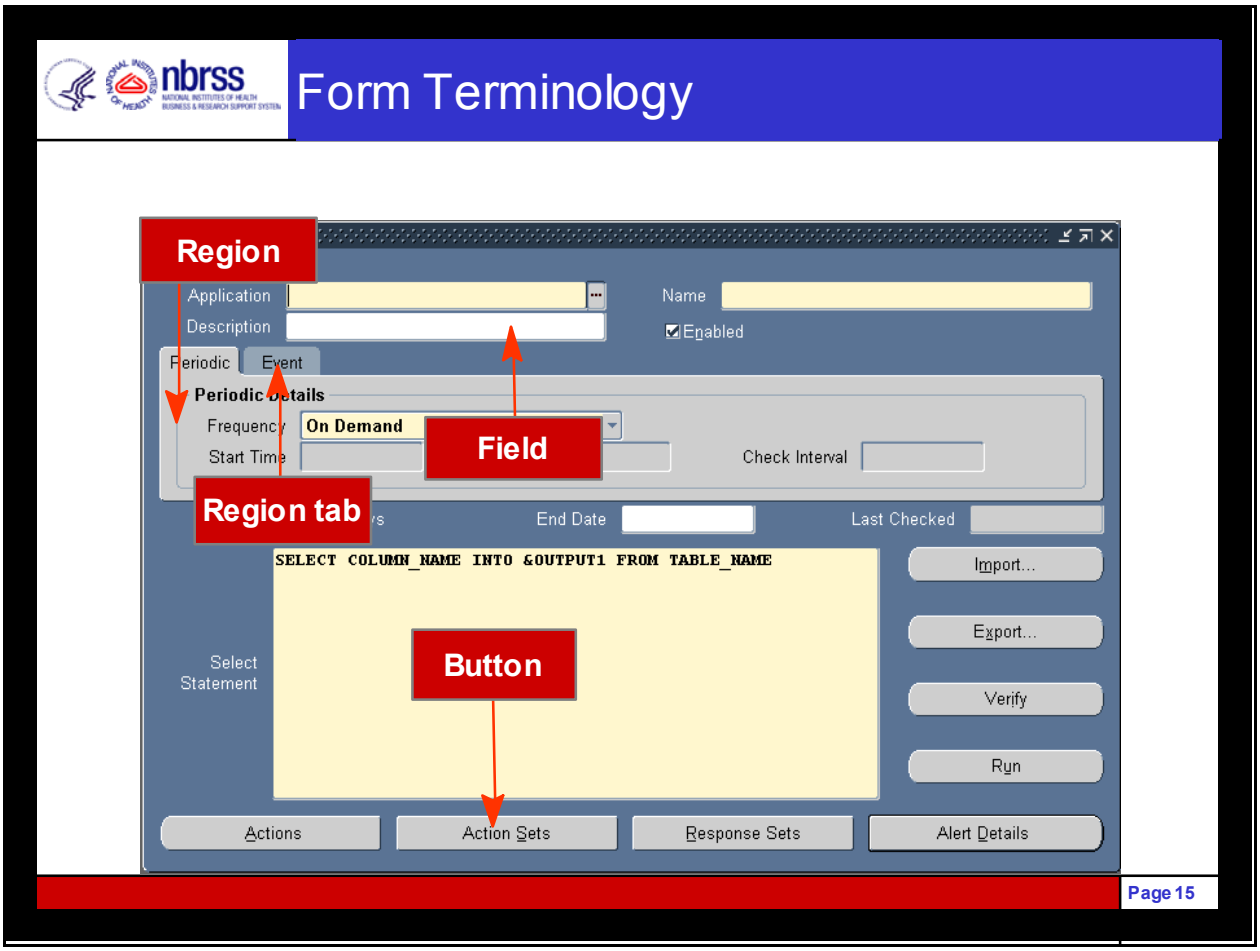
Toolbar – Use icons from the bar to navigate or perform actions within a form

Window—An area where the user interacts with an application (Many windows can be open at one time and you can access these "overlapping" windows to perform data entry or data search activities.)

Title Bar—Text in the title bar that indicates the name of the window, and usually, context information pertinent to the information in that window

Tool tips—Iconic bubble help that you can use to determine the function of a button on the toolbar

Status Bar - The status line displays status information and pertinent information for processing your form.



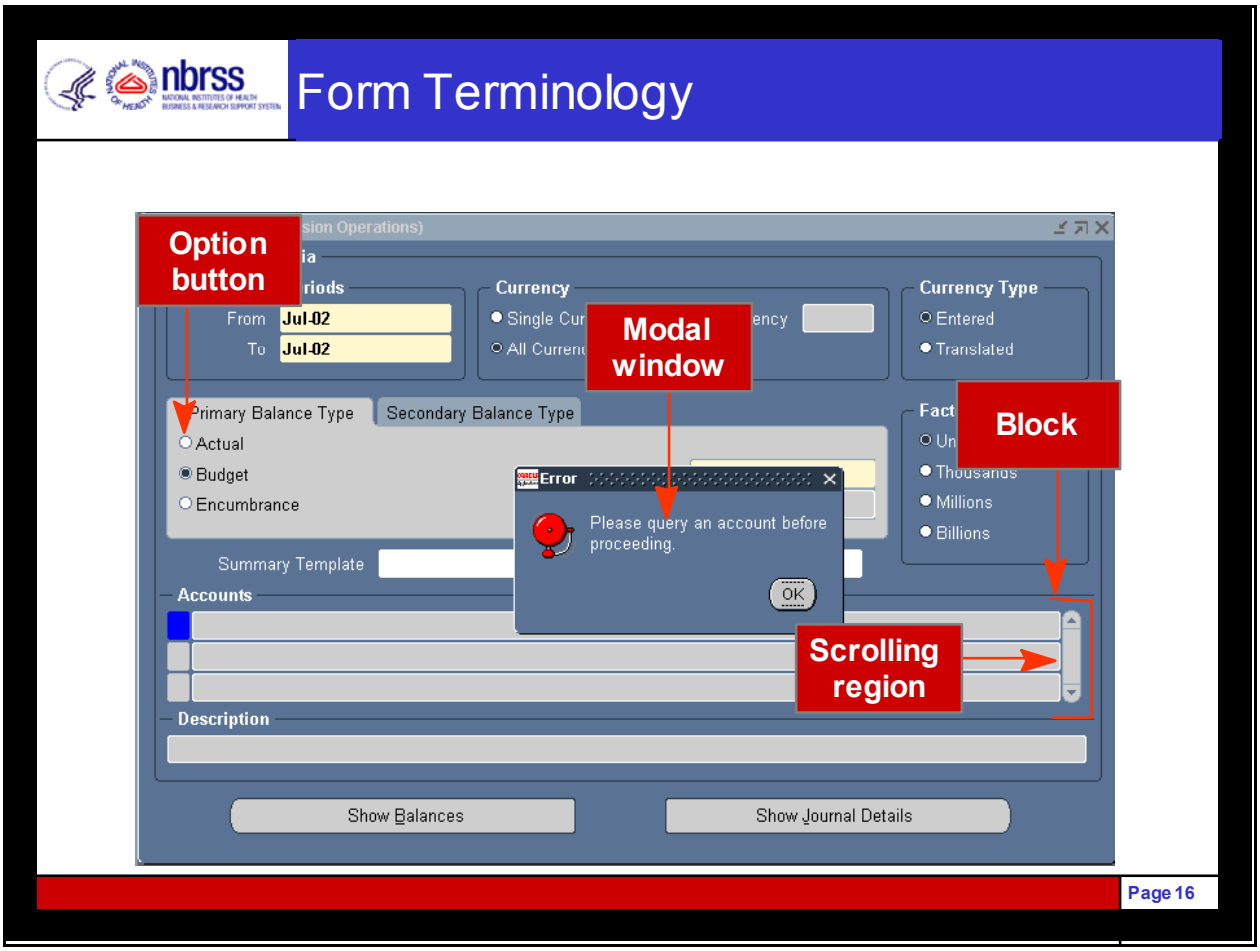

**Form Terminology (continued)**

Region—A logical grouping of fields set apart from other fields by a box outline

Region tab—A collection of regions that occupy the same space in a window where only one region can be displayed at a time

Field—An area in a window that displays data or enables you to enter data

Button—A graphic element that initiates a predefined action when you click it



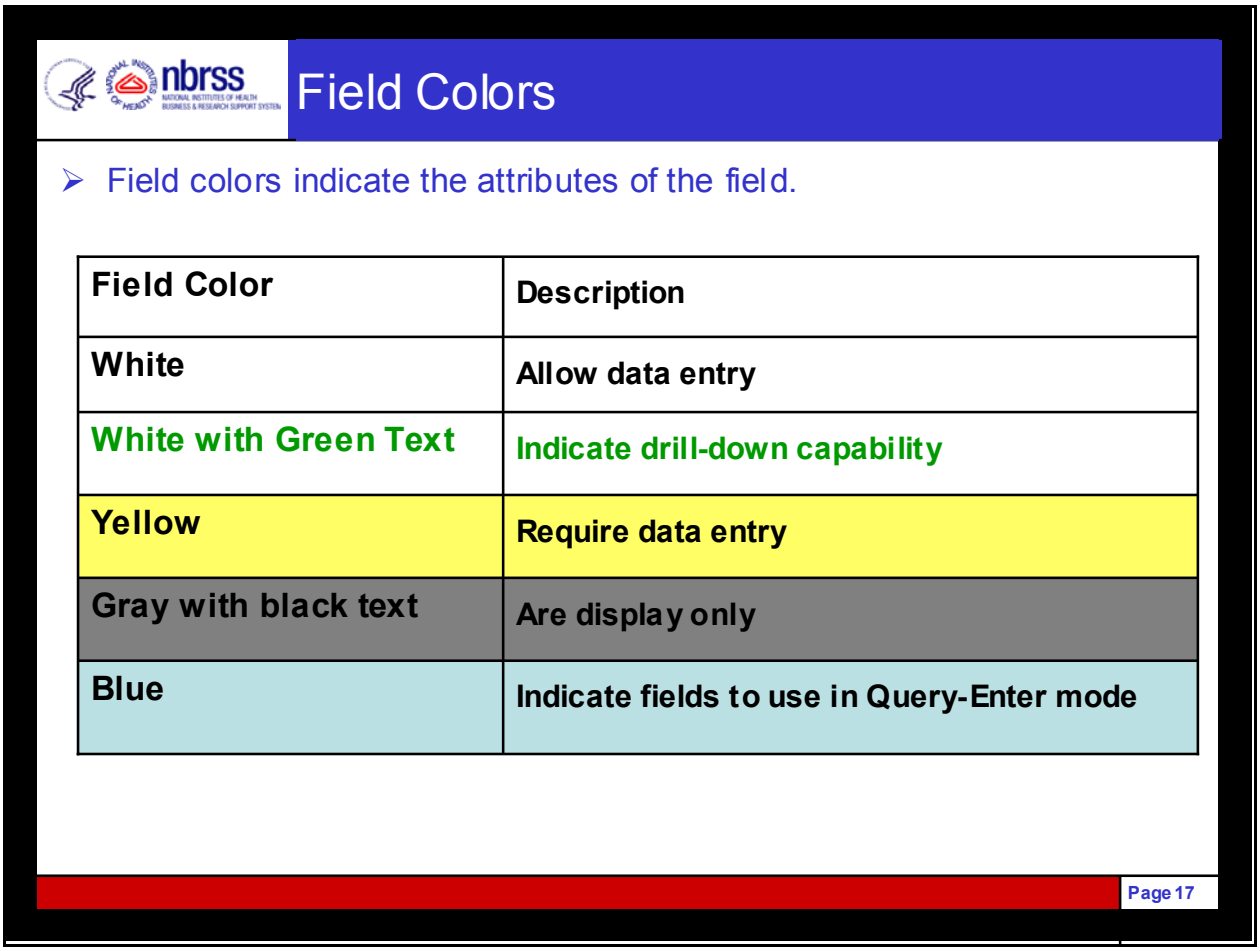

**Form Terminology (continued)**

Option button—A button that indicates an individual selection is available within an option group

Modal window—A window that requires you to act on its content *before continuing*

Scrolling region—A region, containing a scroll bar, in which to view other fields

Block—An area of information relative to a specific business function or entity




**What Field Colors Indicate**

Each block contains fields you use to enter, view, update, or delete information. A field prompt describes each field by telling you what kind of information appears in the field or what kind of information you should enter in the field. Fields are color coded to indicate their type as follows:

White Fields—allow data entry

White Fields with Green Text—indicate drill-down capability

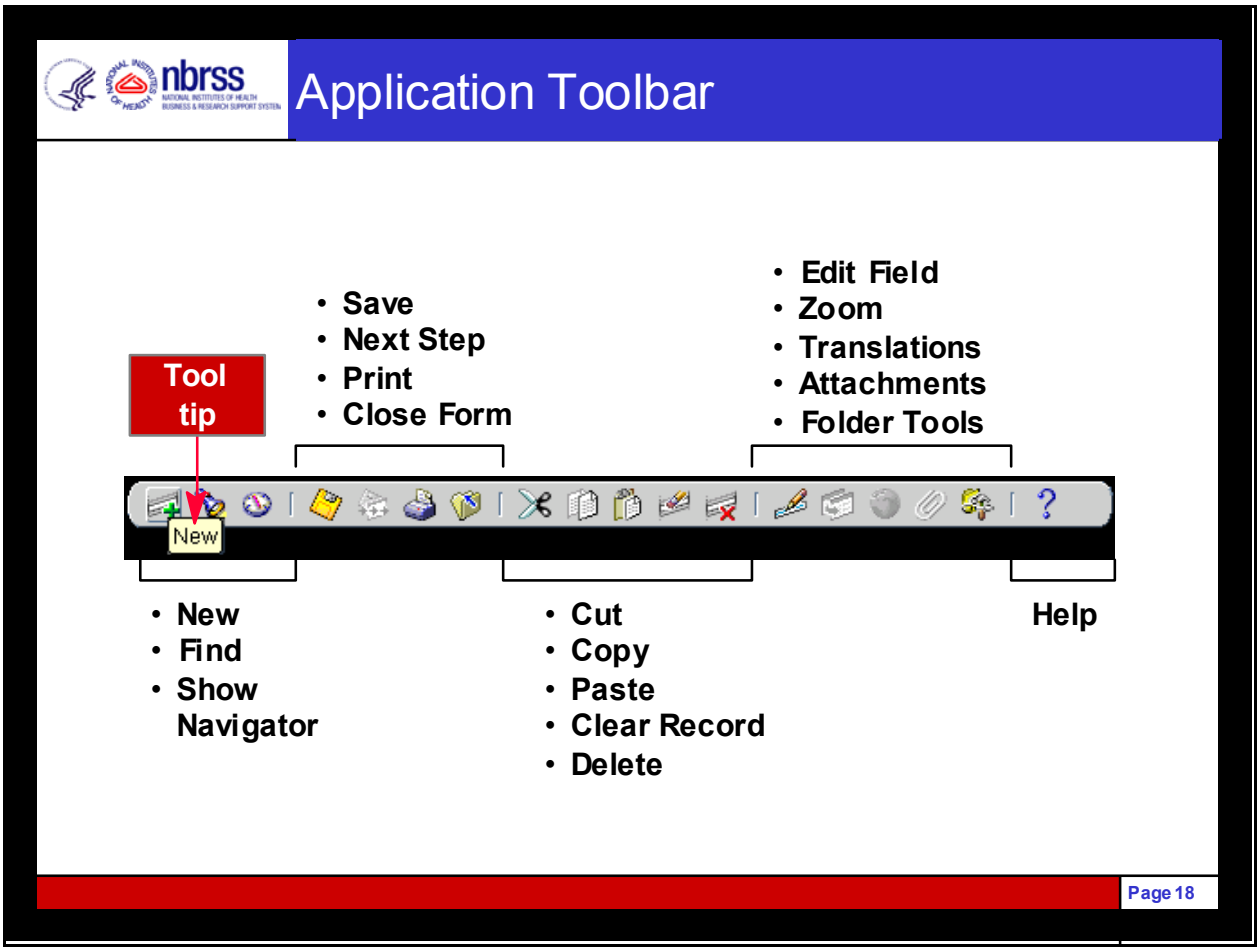
Yellow Fields—require data entry

Gray Fields with Black Text—are display-only

Blue Fields—indicate fields to use in Query-Enter mode

The term field generally refers to a text field, an area in a window that either displays data or allows you to enter data. However, a field can also include a button, check box, option group, or poplist.

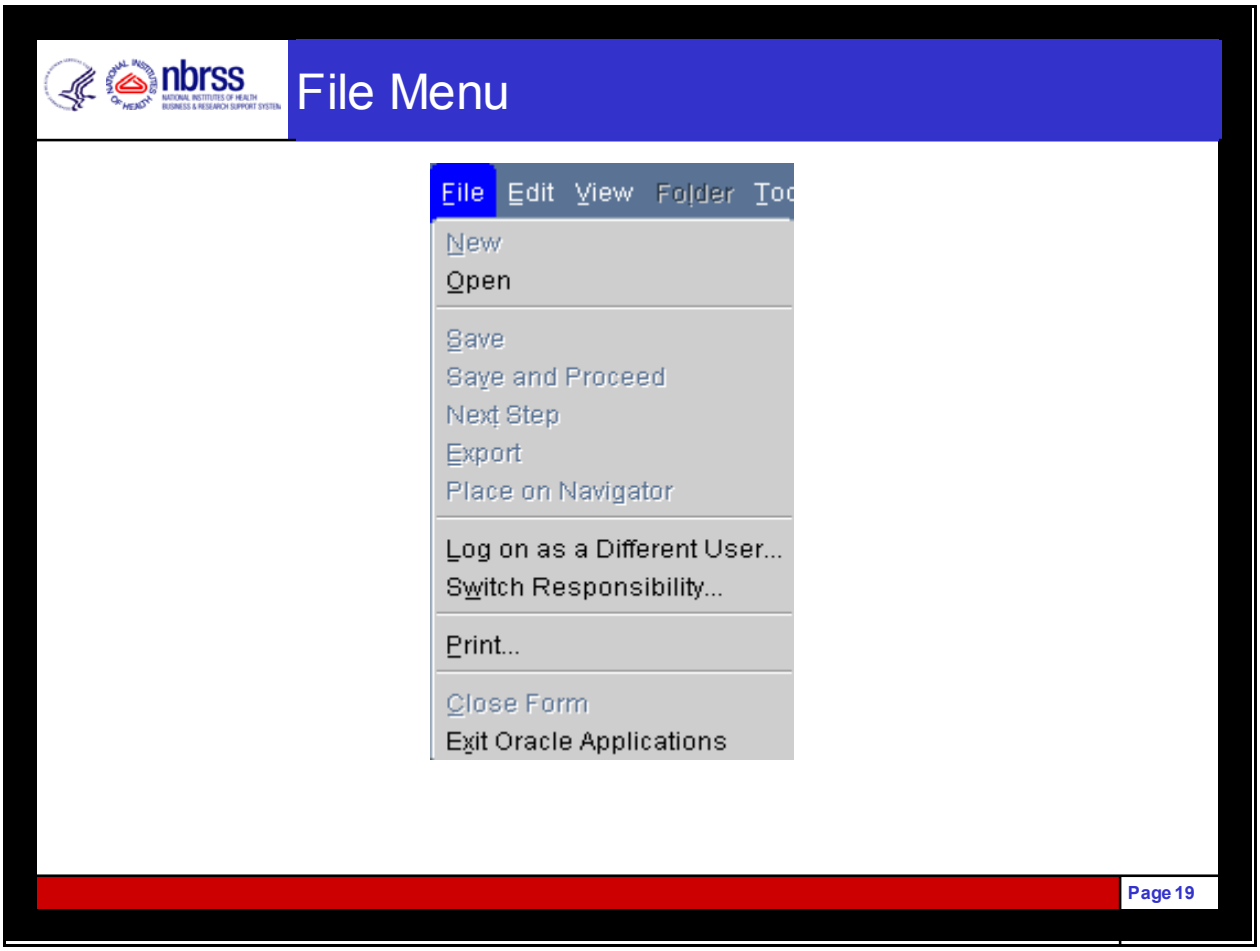
# Application Toolbar




**Using the Toolbar**

The toolbar is a collection of iconic buttons, where each button performs a specific action when you choose it. Each toolbar button replicates a commonly-used menu bar item. Depending on the context of the current field or window, a toolbar button can be enabled or disabled. You can display help or a tool tip for an enabled toolbar button by holding your mouse over the button.

# File Menu




**Using the File Menu from the Menu Bar**

**New**—Creates a new record in the active form.

**Open**—Opens the detail screen for the current selection.

**Save**—Saves any pending changes in the active form.

**Save and Proceed**—Saves any pending changes in the active form and advances to the next record.

**Next Step**—Updates the Process workflow in the Navigator by advancing to the next step in the process.

**Export**—Exports information in your current form to a browser.

**Place on Navigator**—Creates an icon in the Documents tab of the Navigator which can be used to recall the active form and its current record.

**Log on as a Different User**—Allows you to log on to Oracle Applications again as a different user.

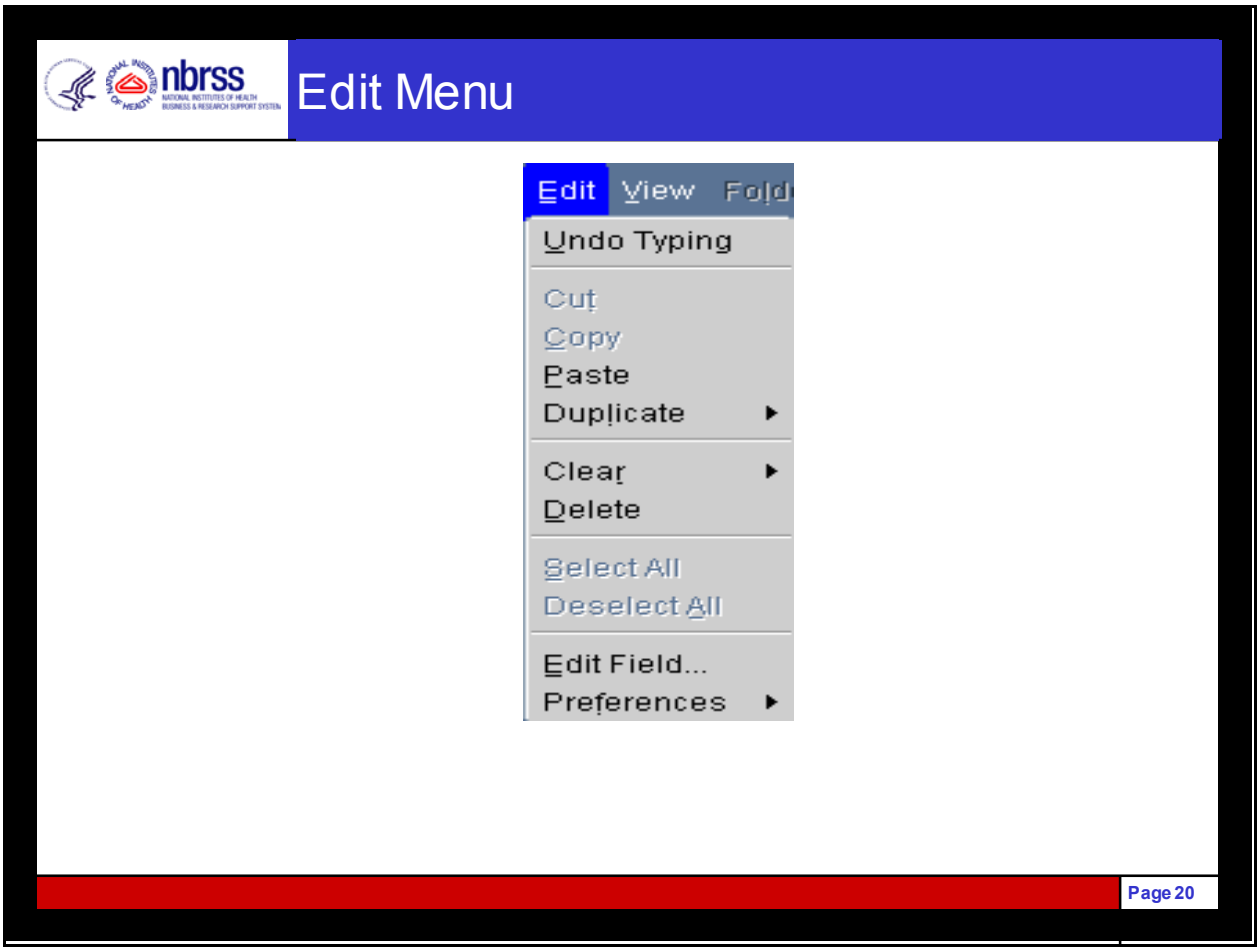
**Switch Responsibility**—Allows you to change the responsibility in effect for your current log on.

**Print…—**Prints your current window. An application may override this action to instead allow printing of one or more specific reports.

**Close Form**—Closes all windows of the current form.

**Exit Oracle Applications**—Quits Oracle Applications.

# Edit Menu




**Using the Edit Menu from the Menu Bar**

**Undo Typing**—Undoes any typing done in a field before the field is exited and returns the field to the most recent value.

**Cut**—Cut the current selection to the clipboard.

**Copy**—Copy the current selection to the clipboard.

**Paste**—Paste the contents of the clipboard into the current field.

**Duplicate Record Above**—Copies all values from the prior record to the current record.

**Duplicate Field Above**—Copies the value of the current field from the prior row.

**Clear Record**—Erases the current record from the window.

**Clear Field**—Clears the data from the current field.

**Clear Block**—Erases all records from the current block.

**Clear Form**—Erases any pending changes from the current form.

**Delete**—Deletes the current record from the database.

**Select All**—Selects all records (for blocks with multi-select).

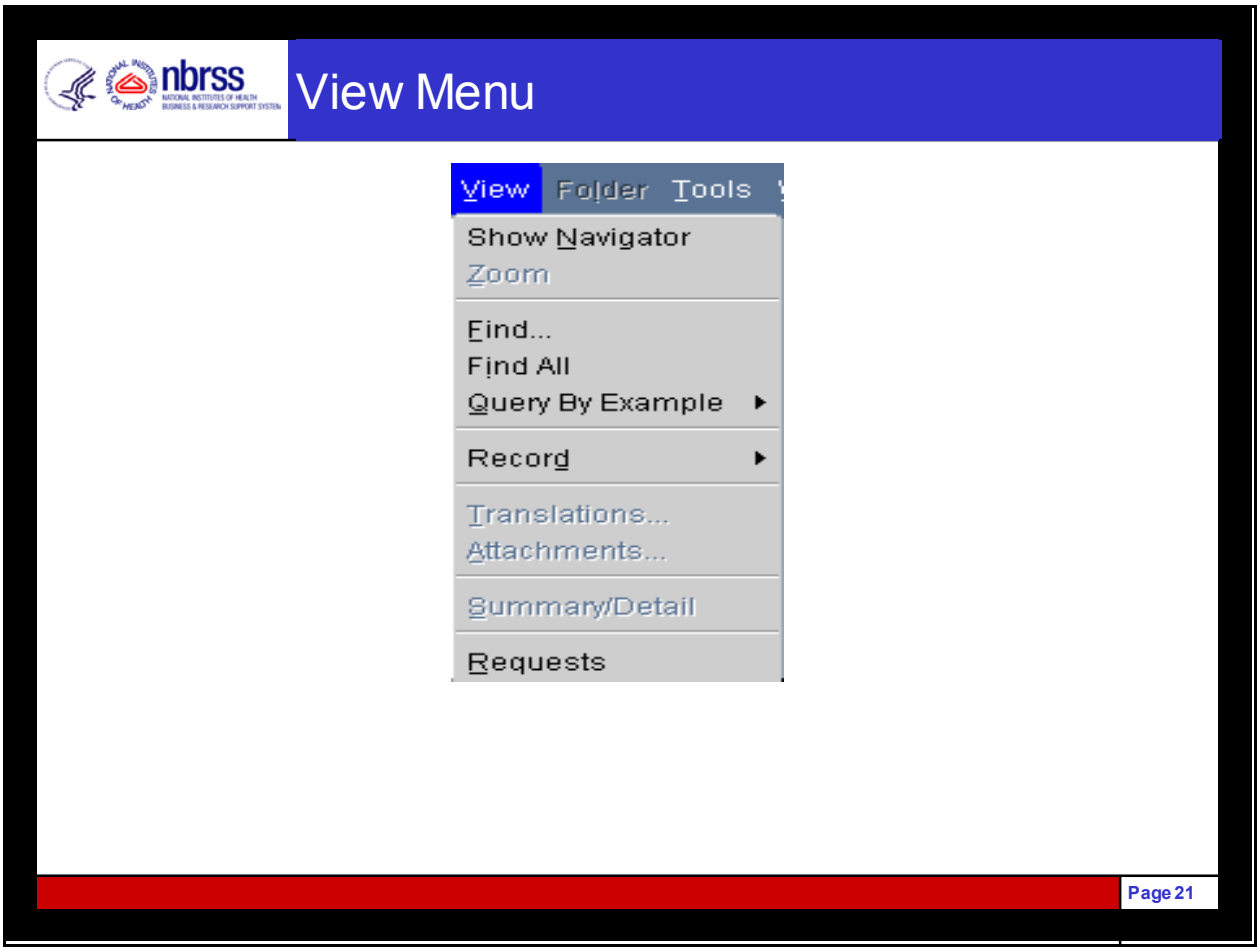
**Deselect All**—Deselects all selected records except for the current record (for blocks with multi-select).

**Edit Field…—**Displays the Editor window for the current field.

**Preferences Change Password**—Displays the Change Password dialog box. Do not use this feature.

**Preferences Profiles**—Displays the Profiles window.

# View Menu




**Using the View Menu from the Menu Bar**

**Show Navigator**—Displays the Navigator window.

**Zoom**—Invokes custom defined zooms.

**Find…** —Displays the Find window to retrieve records.

**Find All** —Retrieves all records.

**Query by Example Enter**—Invokes 'Enter Query' mode to enter search criteria for a query-by-example.

**Query by Example Run**—Executes the query-by-example.

**Query by Example Cancel**—Cancels the query-by-example by exiting from 'Enter Query' mode.

**Query by Example Show Last Criteria**—Recovers the search criteria used in the previous query-by-example.

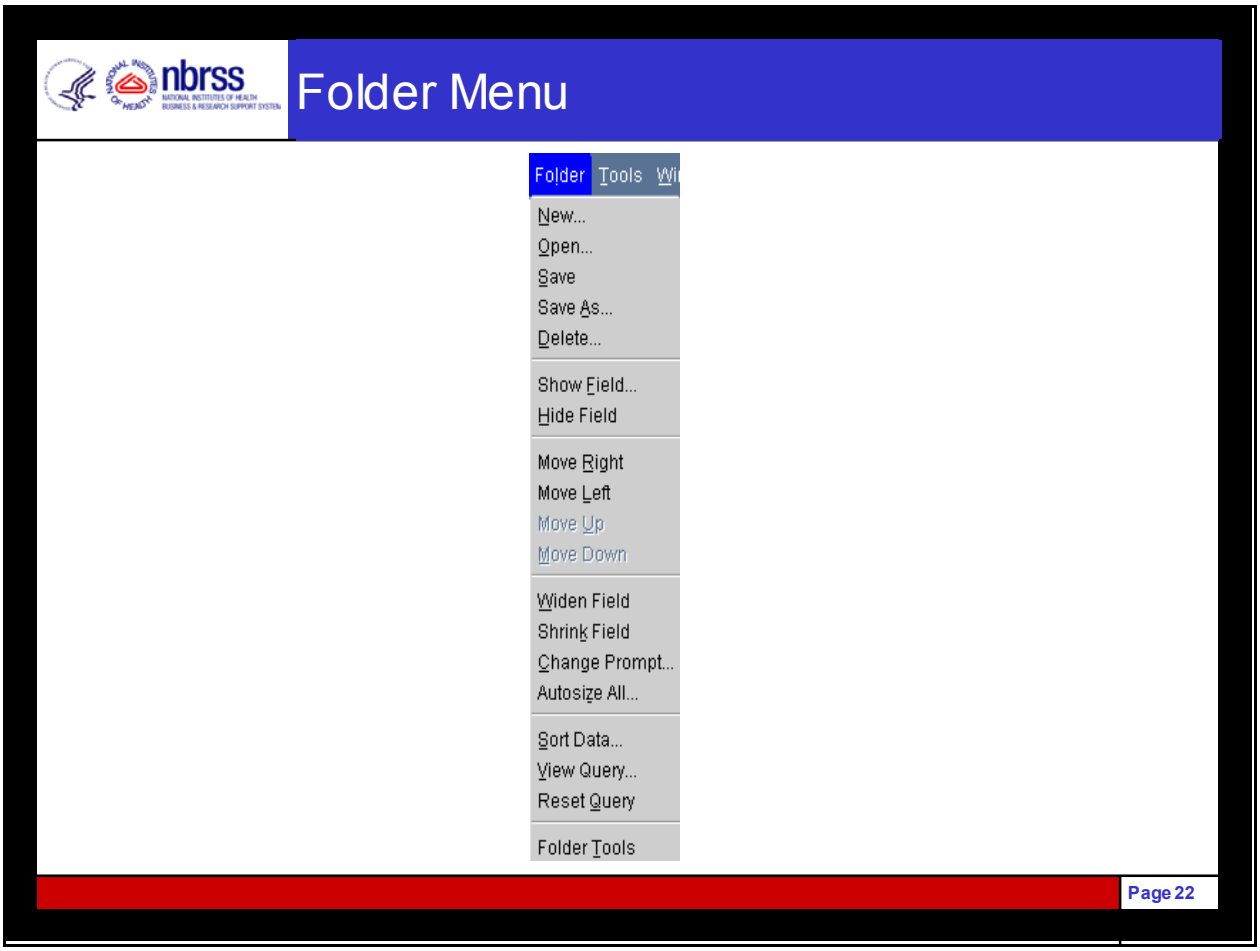
**Query by Example Count Matching Records**—Counts the number of records that would be retrieved if you ran the current query-by-example.

**Record First**—Moves the cursor to the first record.

**Record Last**—Moves the cursor to the last record.

**Translations…—**Displays the Translations window.
**Attachments…—**Displays the Attachments window.
**Summary/Detail**—Switch between the summary and detail views of a combination block.
**Requests**—Displays the Request window.

# Folder Menu




**Using the Folder Menu from the Menu Bar**

For some forms, you can personalize the presentation of data within a form by using a folder definition. With a folder definition you can modify the width, sequence, and prompts of the fields you want to display. Additional features of a folder definition are:

Displaying only those fields you are interested in viewing

Displaying a subset of records based on your specific criteria

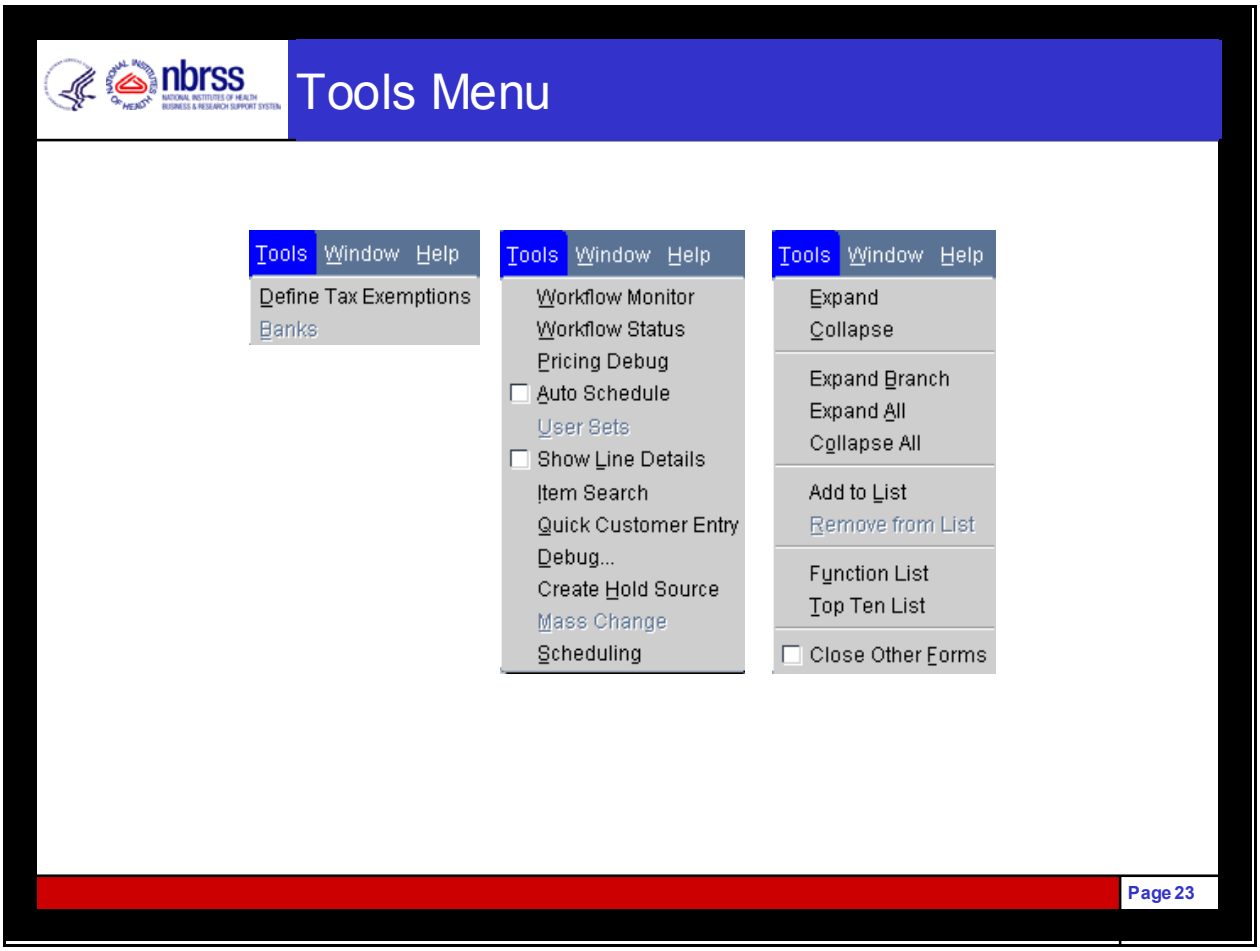
Automatically querying for a subset of records each time you open a specific folder

Keeping your folder customizations private or making them public for others to use

Making your customizations the default layout for a folder

**Note**: At this time, we do not encourage users to set up their own folders. Contact the NIH Help Desk if you are interested in using this functionality.

# Tools Menu

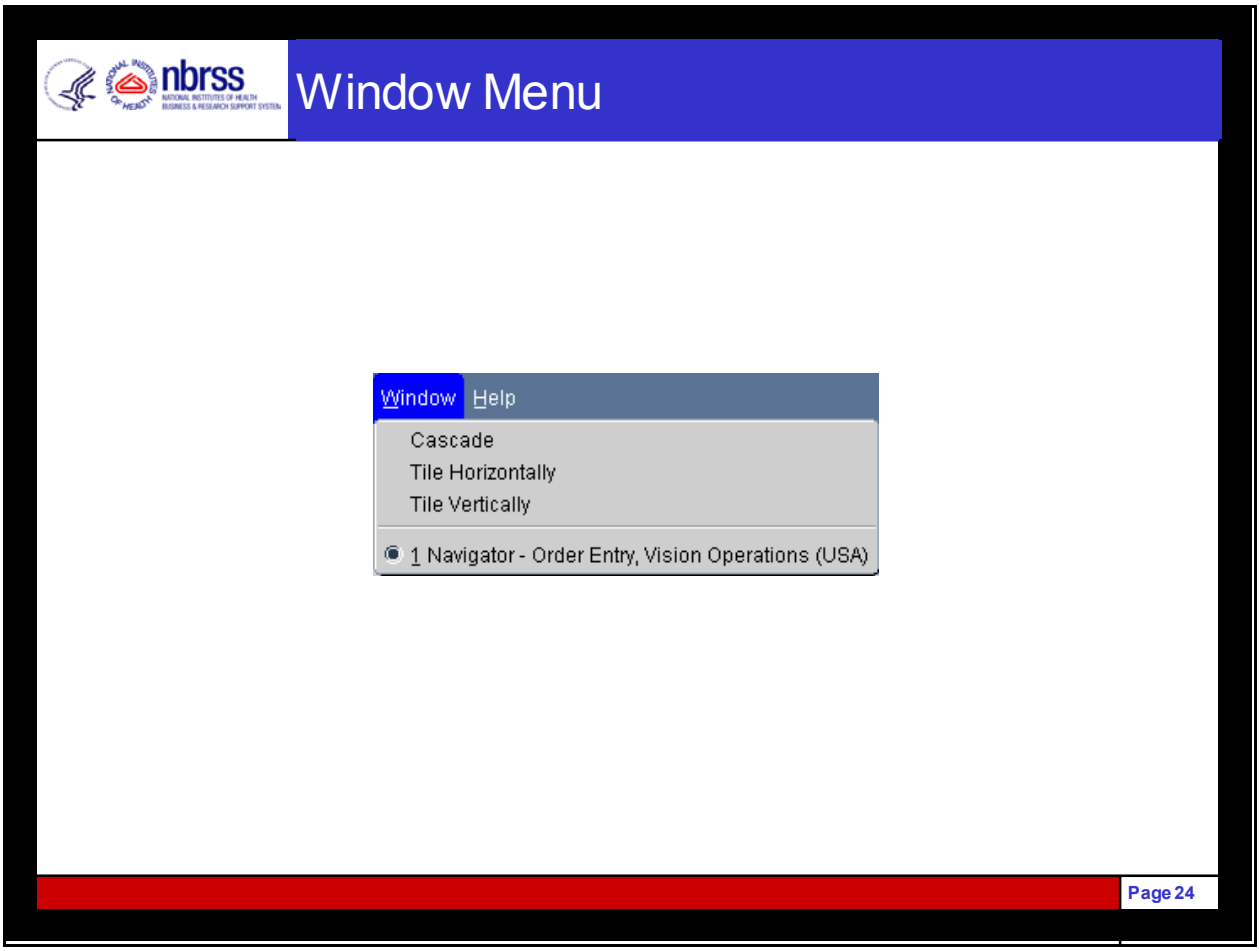



**Using the Tools Menu from the Menu Bar**

The Tools menus may contain up to fifteen product-specific entries. Examples of product-specific entries may include a list of commonly used Inquiry windows in the application, or a commonly used window that a user may want to display for a quick reference.

In some applications, up to two additional menus may appear after the Tools menu. These menus are usually labeled “Reports” and “Actions”, but may be different depending on the products that are being used. Like the Tools menu, these menus each allow up to 15 product-specific entries.

# Window Menu




Using the Window Menu from the Menu Bar

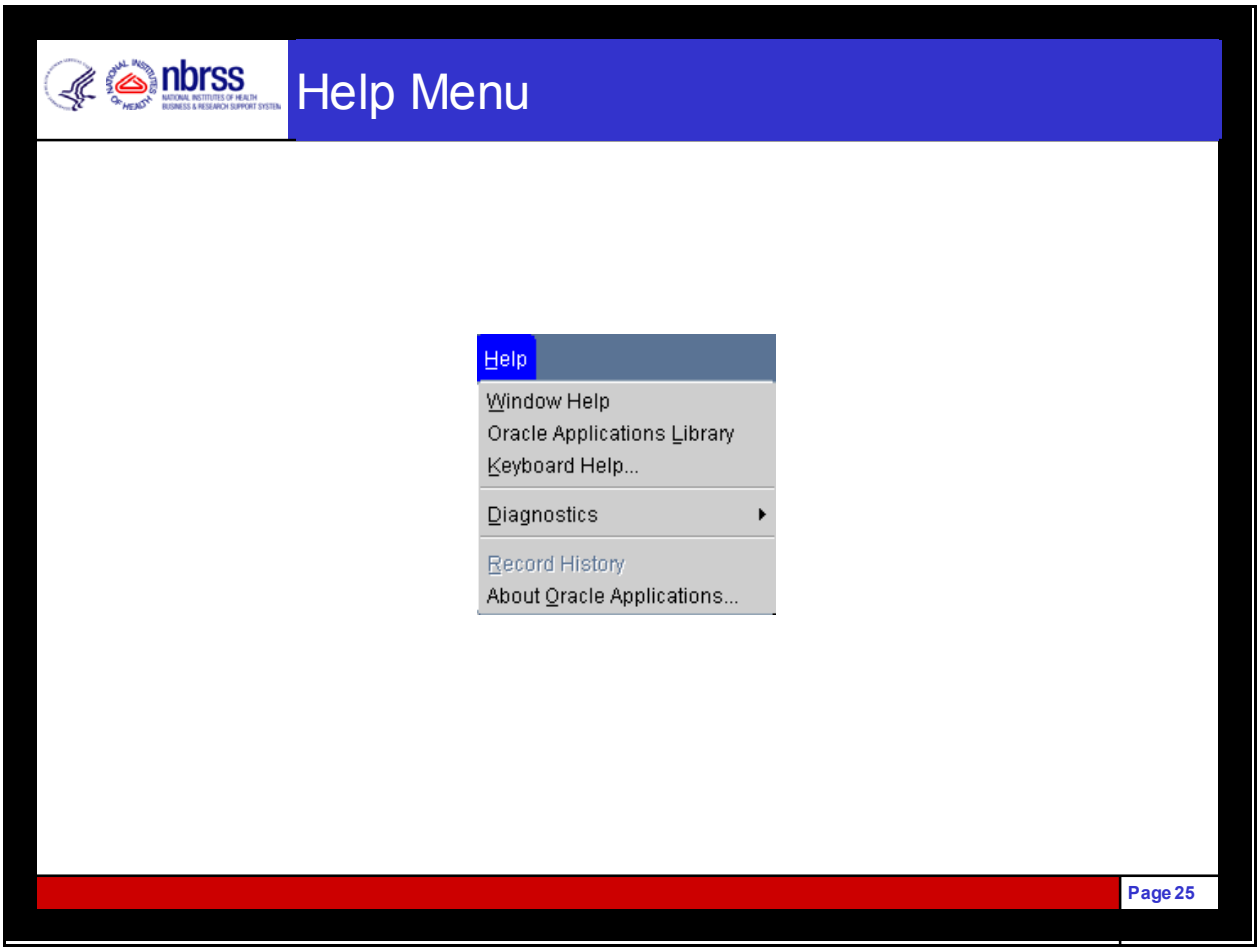
**Cascade**—Displays any open windows in a "cascaded" or stair-stepped fashion.

**Tile Horizontally**—Displays any open windows in a horizontally "tiled" (non-overlapping) fashion.

**Tile Vertically**—Displays any open windows in a vertically "tiled" (non-overlapping) fashion.

**1 (Title of Open Window)—**Displays a list of open windows titles in the order in which they are stacked.

# Help Menu




Using the Help Menu from the Menu Bar

**Window Help**—Displays Help for the current window

**Oracle Applications Library**—Displays a window that lists all available Oracle Applications Help text

**Keyboard Help…—**Displays the current mapping of specific functions and menu options

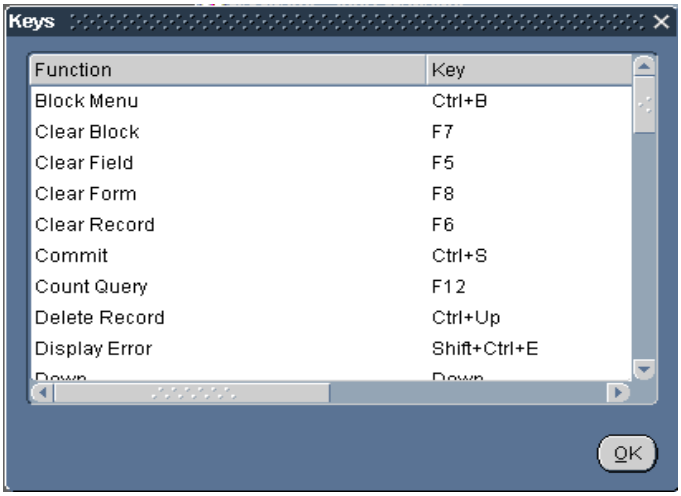
**Diagnostics**—There are multiple Diagnostics menus used for coding and debugging. Do not use this functionality.

**Record History**—Displays information about who created and updated the current record.

**About Oracle Applications**—Displays information about the current window and application

## Keyboard Shortcuts

- Keyboard short cuts are available for many functions in Oracle.
- To view a list of Keyboard Shortcuts, navigate to
  **M > Help > Keyboard Shortcuts**

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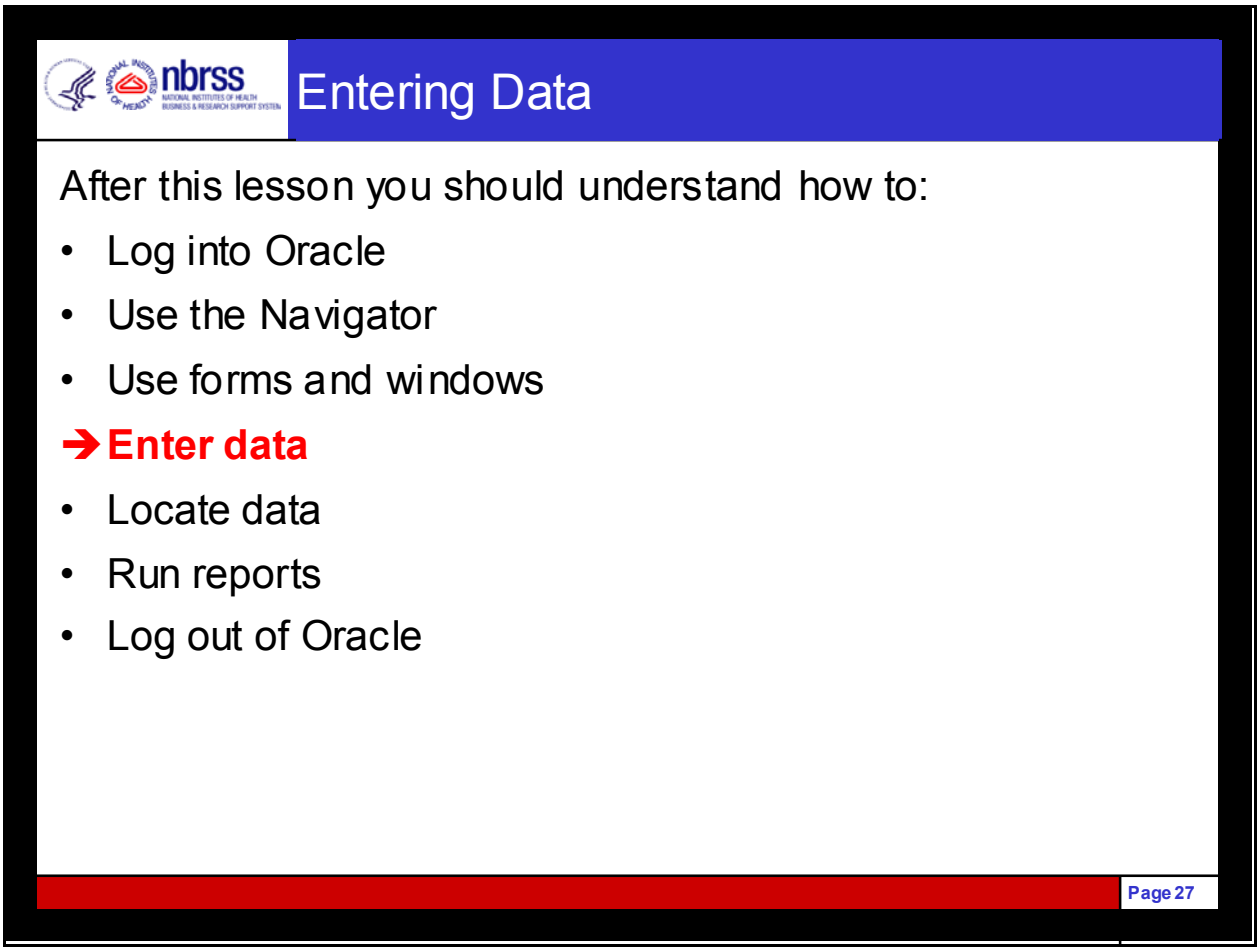
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Entering Data
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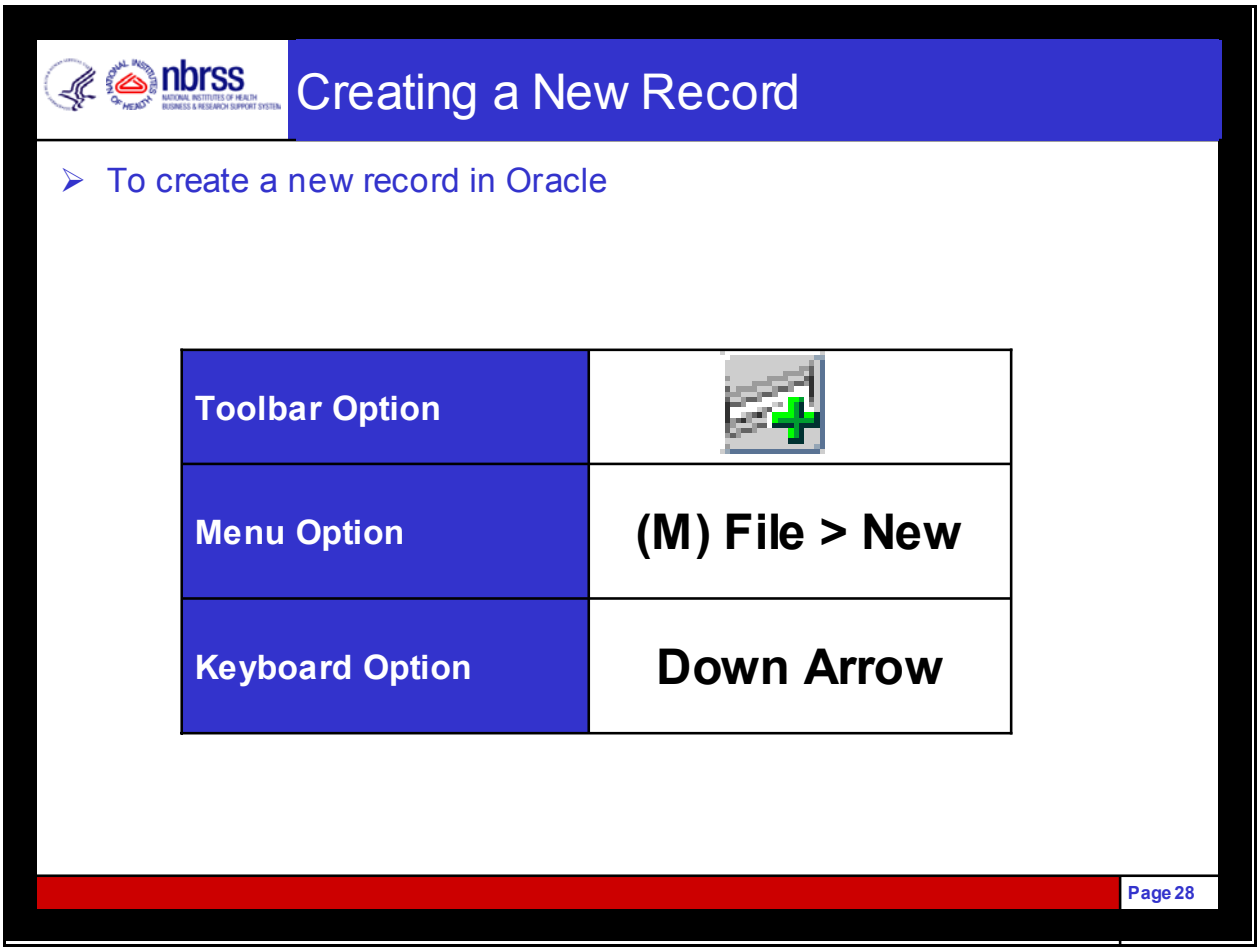



**Creating a New Record**

When you add a new record to the database, Oracle Applications will move the current record down and insert a new blank row. You add a new record by entering information into this blank row. In most screens you are automatically on a new record when the form is opened, so you can just start entering the information.

After you finish entering the data for your new record, you must remember to click Save so that your newly added information will be written to the database. If you enter five new blank rows of information but do not click Save when you are finished, none of this newly added information will be updated in the database (the system will prompt you to save before you exit).

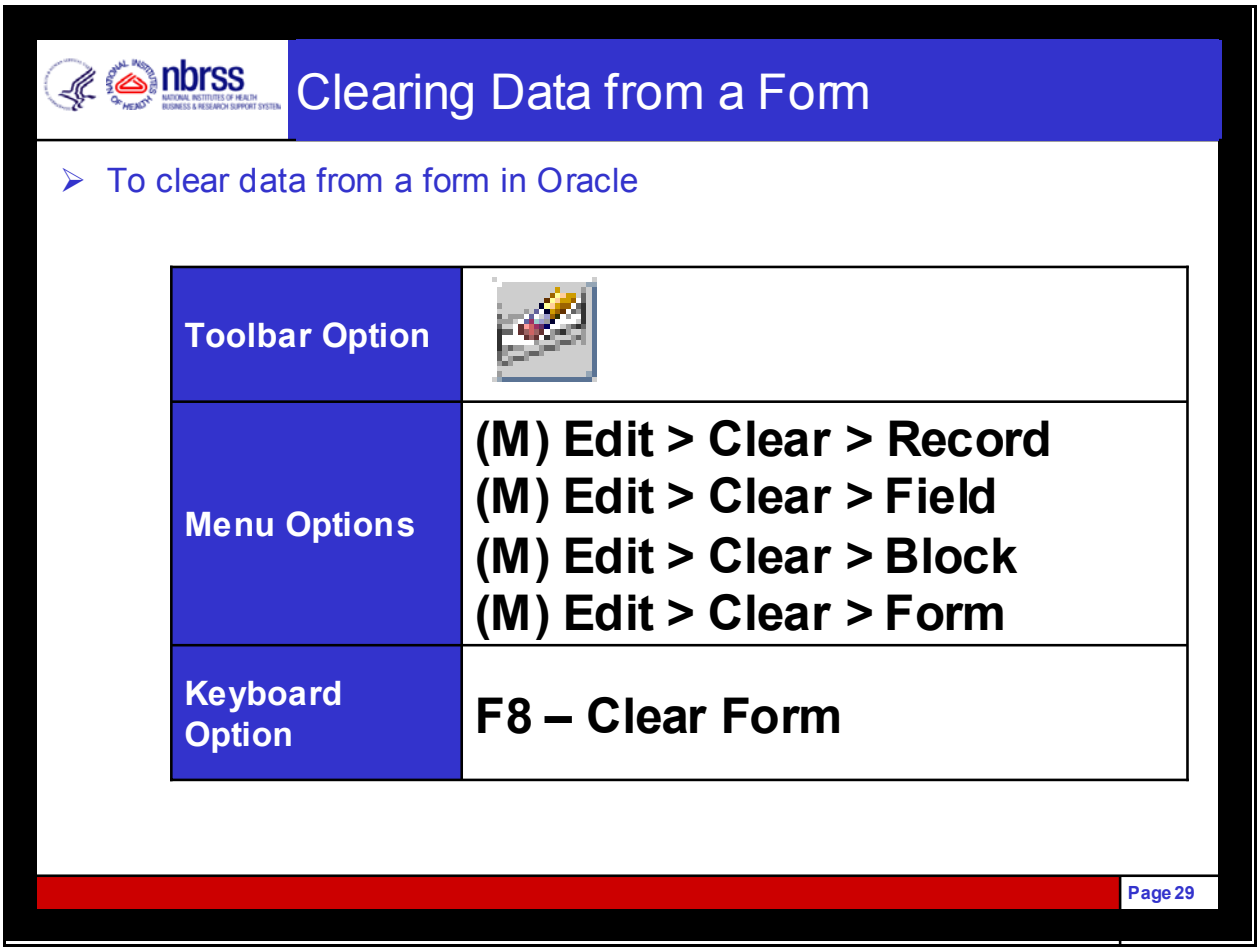
**How to Create a New Record**

(M) File > New. Or, click the **New** icon on the toolbar.

You can also press the down arrow on your keyboard to insert a blank row, if you are not in a table on the form. Additionally, some windows may have a button labeled New, and clicking it will insert a blank row. (The **Customers Standard** window is an example)

Type the new information into the blank row.

(M) File > Save or click the **Save** icon to save the new record.




**Clearing Data from a Form**

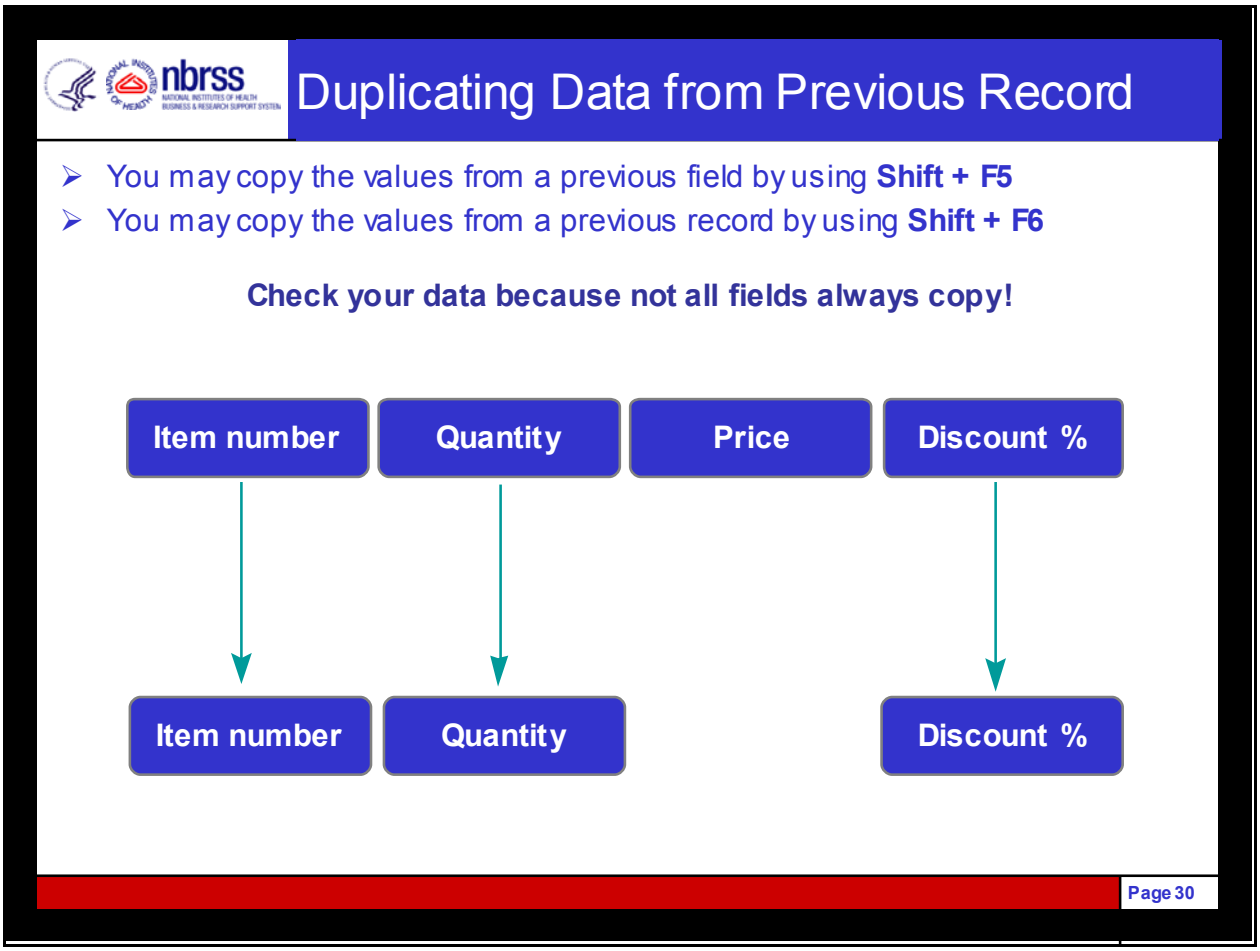
You can clear data from the screen at almost any time. Typically, you will use this feature when you start to enter data into a field and then change your mind. Oracle Applications will think you are in the middle of processing a record and may not proceed with your next task until you clear the field.

The data you clear is simply erased from the screen and not deleted from the database.

> Note: If the data is new and has never been saved to the database, it will be lost permanently when you clear it from the screen.

(M) Edit > Clear, and then choose the appropriate option, to clear a field, record, block, or form.

You can also clear some or all data from a field by highlighting the data and choosing (M) Edit > Cut.




**Duplicating Data from a Previous Record**

To save time during data entry, you can duplicate data from a previous record if much of the data needs to be repeated again in the new record. You can use Cut, Copy, and Paste from the Edit menu or you can use the following techniques:

Copying a Field Value from the Previous Record

1. Enter a new record or query an existing record in your form.
2. (M) File > New or click the New icon to insert a new record after the existing record.
3. Place your cursor in the field whose value you want to duplicate.
4. (M) Edit > Duplicate Field Above, to copy the field value from the previous record into the current record.

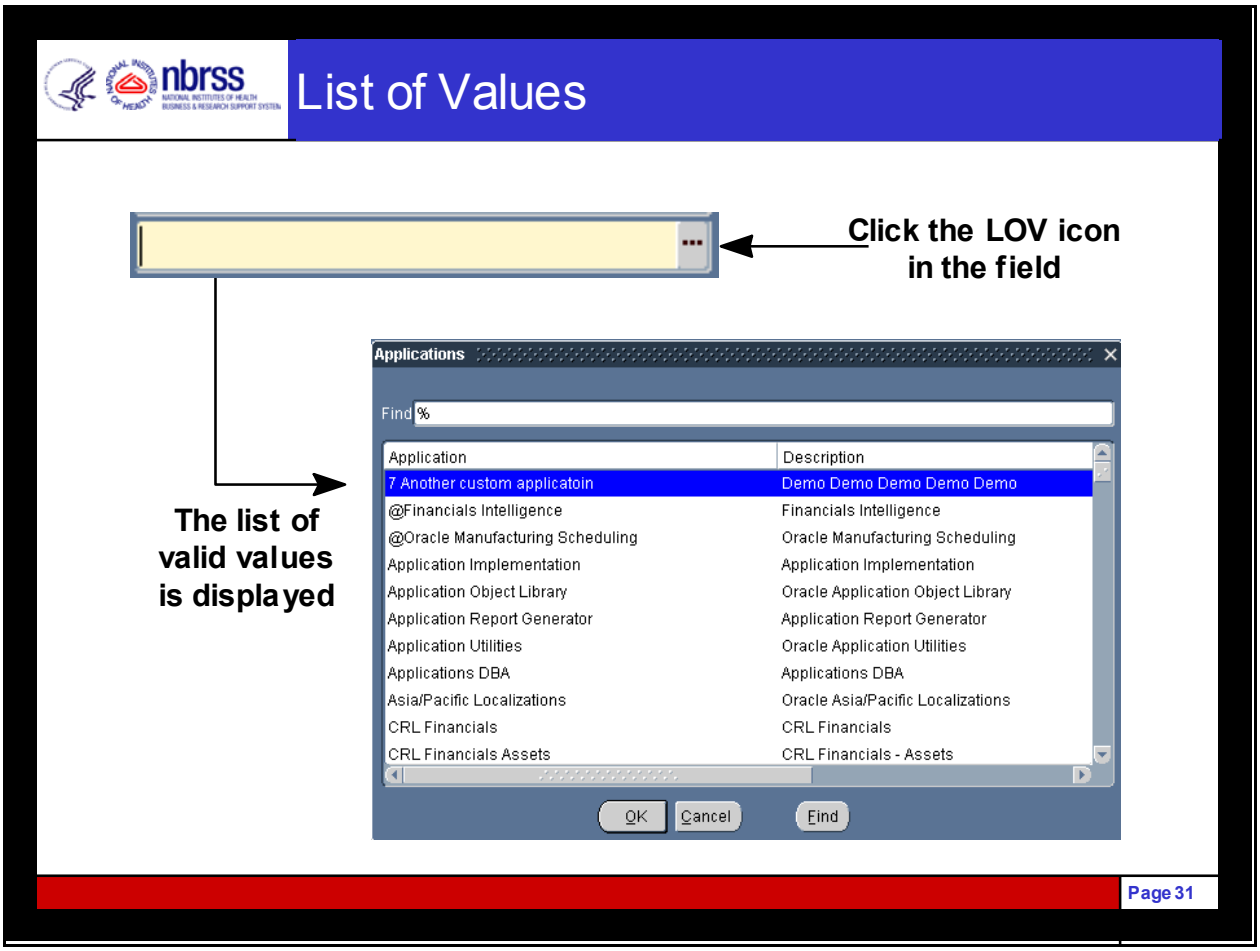
Copying All Field Values from the Previous Record

1. Follow Steps 1, 2 above.
2. (M) Edit > Duplicate Record Above, to copy all field values from the previous record into the current record.

Note: Depending on the record storage in the database and relevant database tables, not all fields may be copied when using this feature. Be sure to check your new record

carefully before you assume all fields have been copied into the new record. This feature may not be enabled in some forms.

Generally information located in flexfields do not copy when using the copy record functionality.

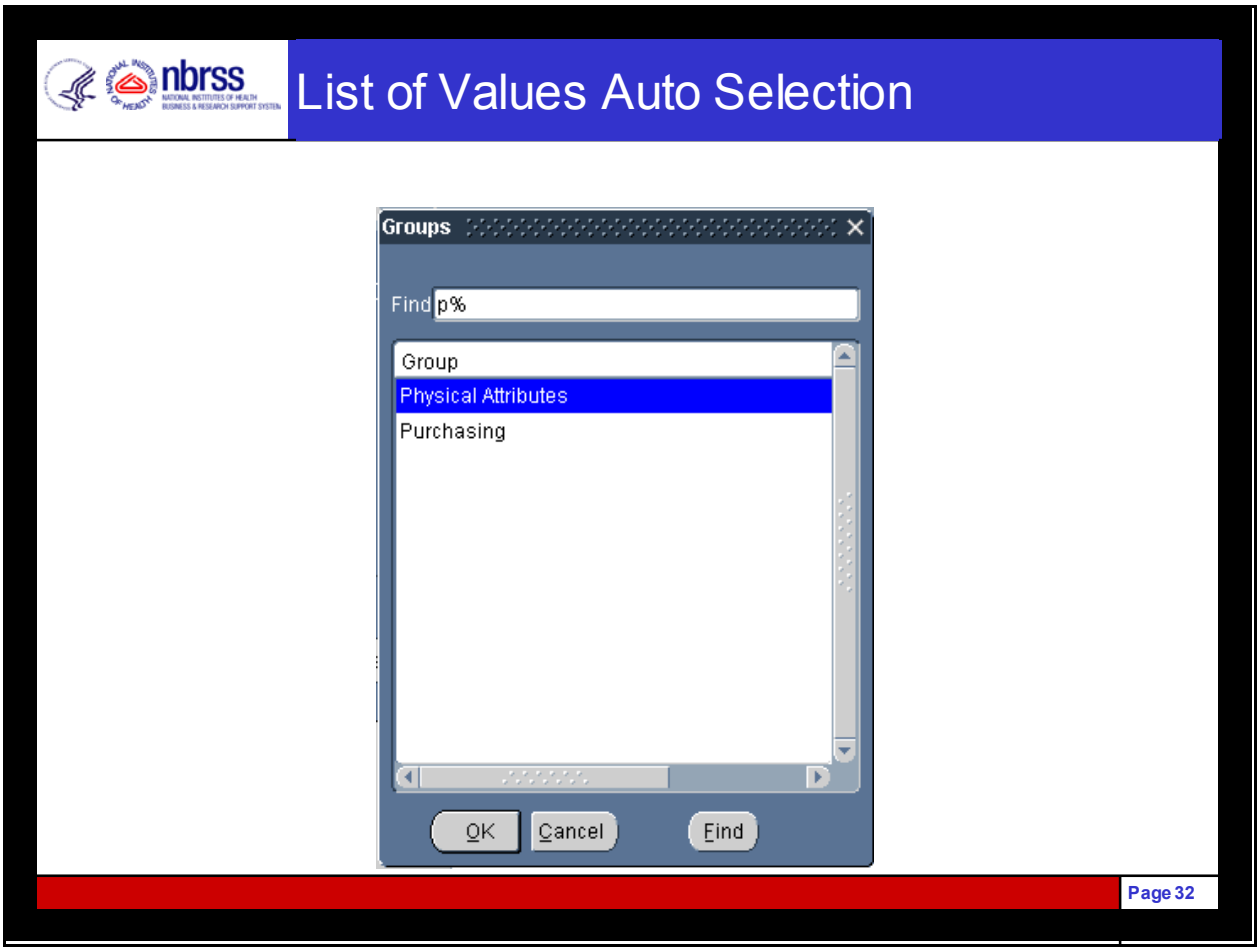



**Using the LOV**

The List of Values (LOV) feature is very useful while entering data in Oracle Applications. It provides you with a powerful, easy-to-use data entry method that increases your accuracy and productivity. Using the LOV makes data entry an easy task for novice users, and experienced users can enter correct data with a minimum number of keystrokes.

Oracle Applications notifies you when a list of acceptable input values is available for a field by displaying the LOV icon in the field. When you display a list, the values appear in a window with a title that describes the contents.

By using the LOV feature, you can save time and enter data quickly without having to memorize or look up valid data for each field. You can choose data from an online list of valid input choices whenever you want. Additionally, you are relying on Oracle Applications to validate your input since you will know right away if your entry does not match an option from the LOV.




**AutoSelection**

Using the list of values feature called AutoSelection you can select a valid name from the list with a single keystroke. When you display the list window, you can type the first character of the name you want in the Find field. If only one choice begins with the character you enter, AutoSelection selects the choice, closes the list window, and enters the value in the appropriate field.

**List Search**

You can use the AutoReduction feature to reduce a list when you know the first few characters of your name selection. If you do not know the initial characters of your choice, but do know that your choice contains a certain word or set of characters, you can perform a list search to reduce a list.

In the list window, enter any group of characters as search criteria in the **Find** field and click the **Find** button. You can use wildcard characters such as the percent sign (%) which represents any number of characters, or an underline (_), which represents a single character in your search criterion.

For example, to reduce a list to only those choices that contain the phrase “schedule,” you would type %schedule% in the Find field and click Find. In any of these list search queries, it does not matter whether you use uppercase or lowercase letters as the search is not case sensitive.


**Long-List Fields**

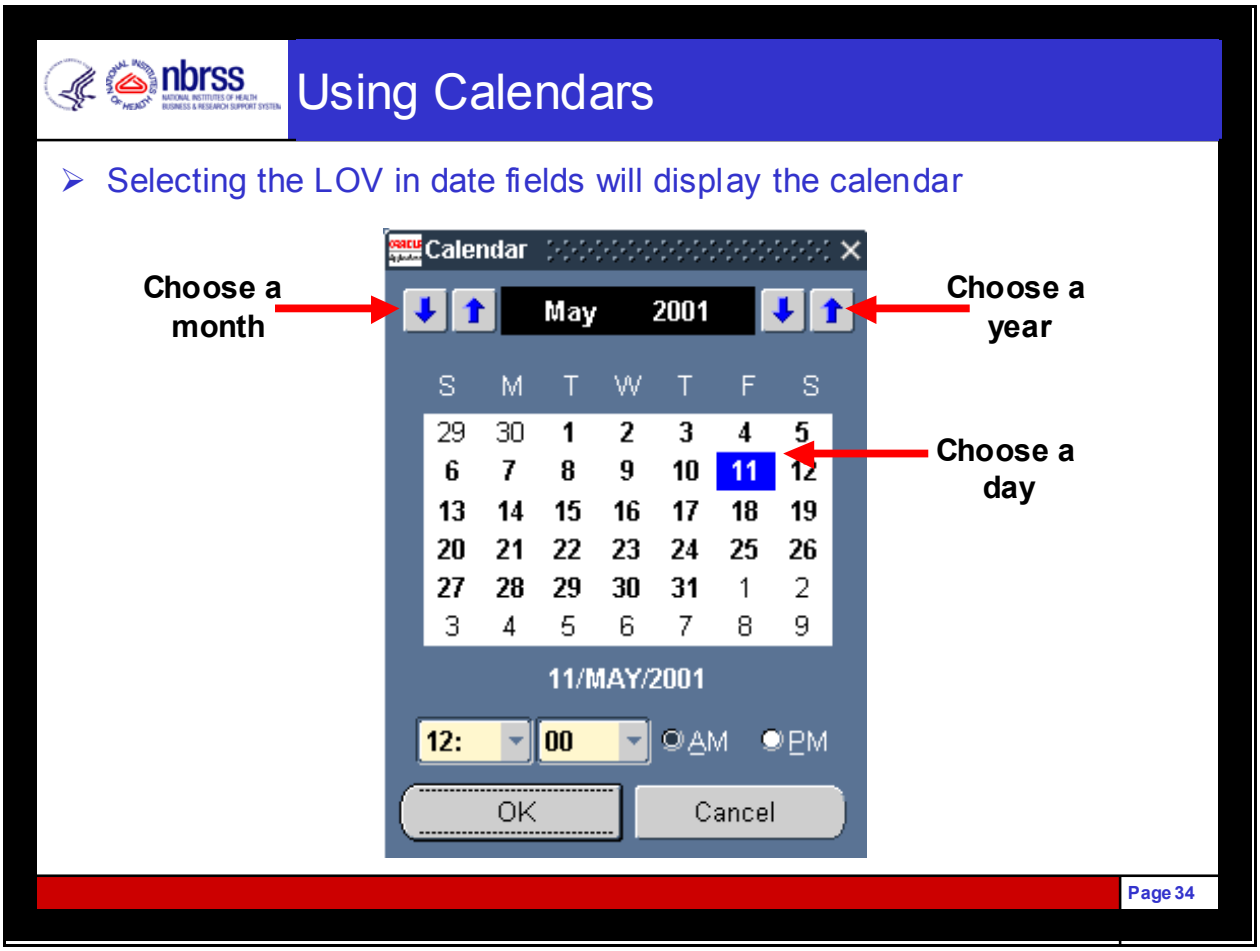
If a field has a "long-list"—that is, a list of more than 100 values—when you try to display the LOV, Oracle Applications will display a window where you can enter list reduction criteria.

Because it takes less time to display a reduced list than a complete long-list, Oracle Applications prompts you to enter the first few characters that occur in your value of interest to reduce the complete list. However, to view the entire long-list, enter the percent sign (%) at the prompt and all of the values will be displayed.

Note: To avoid excessive network traffic and reduced performance, try to enter specific criteria, other than just a percent sign (%), whenever possible.

**Power List**

The Power List feature provides an even faster method of data entry. If a field displays a **LOV** icon and you know the value you want, simply enter the first few characters of the value in the field and press [Tab]. Power List will complete the entry for you. You can also include wildcard characters with your entry. You do not need to display the list window. If more than one value matches the characters you specify, a list window containing those values is displayed. If no values match the characters you enter, a list window containing all the values appears.

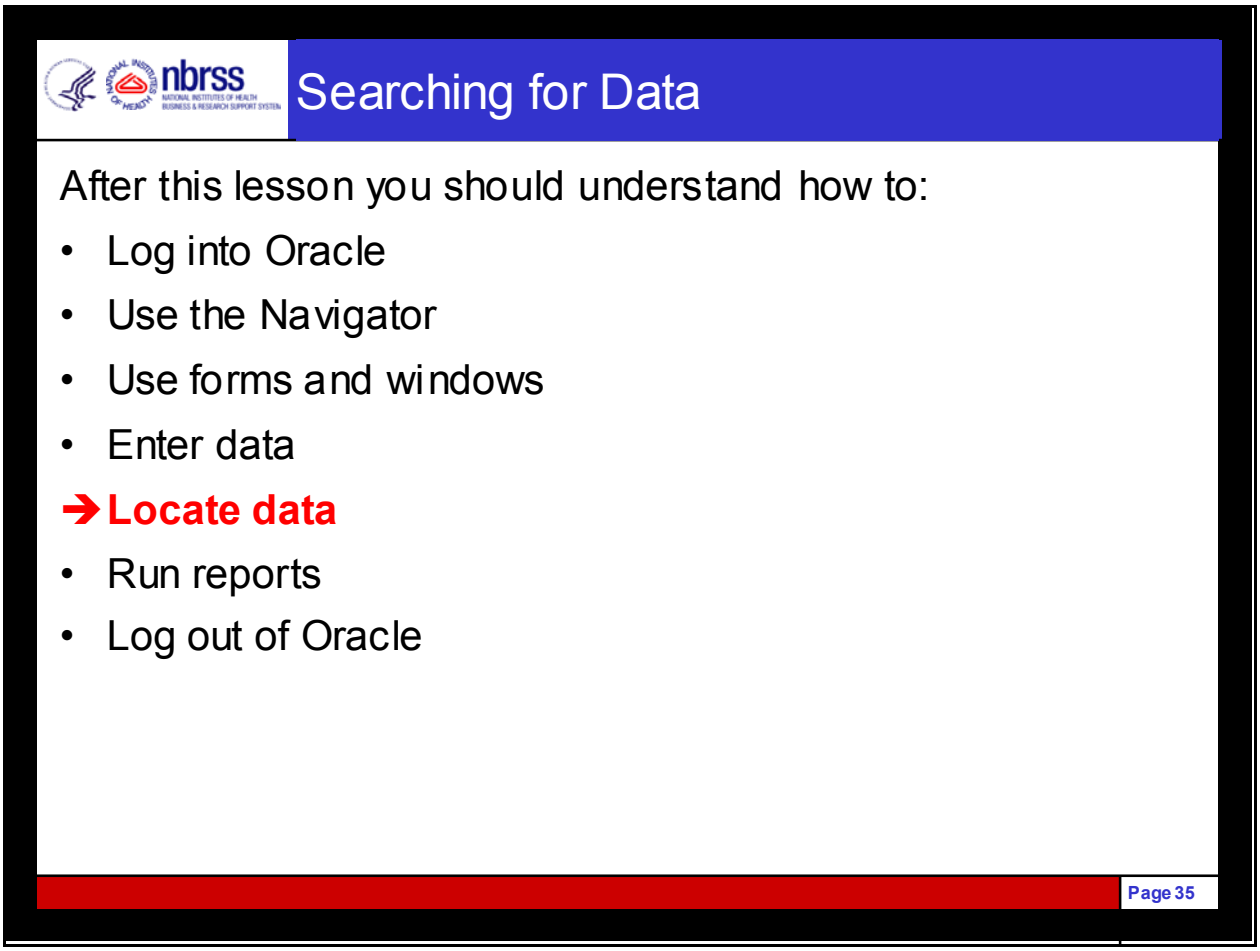


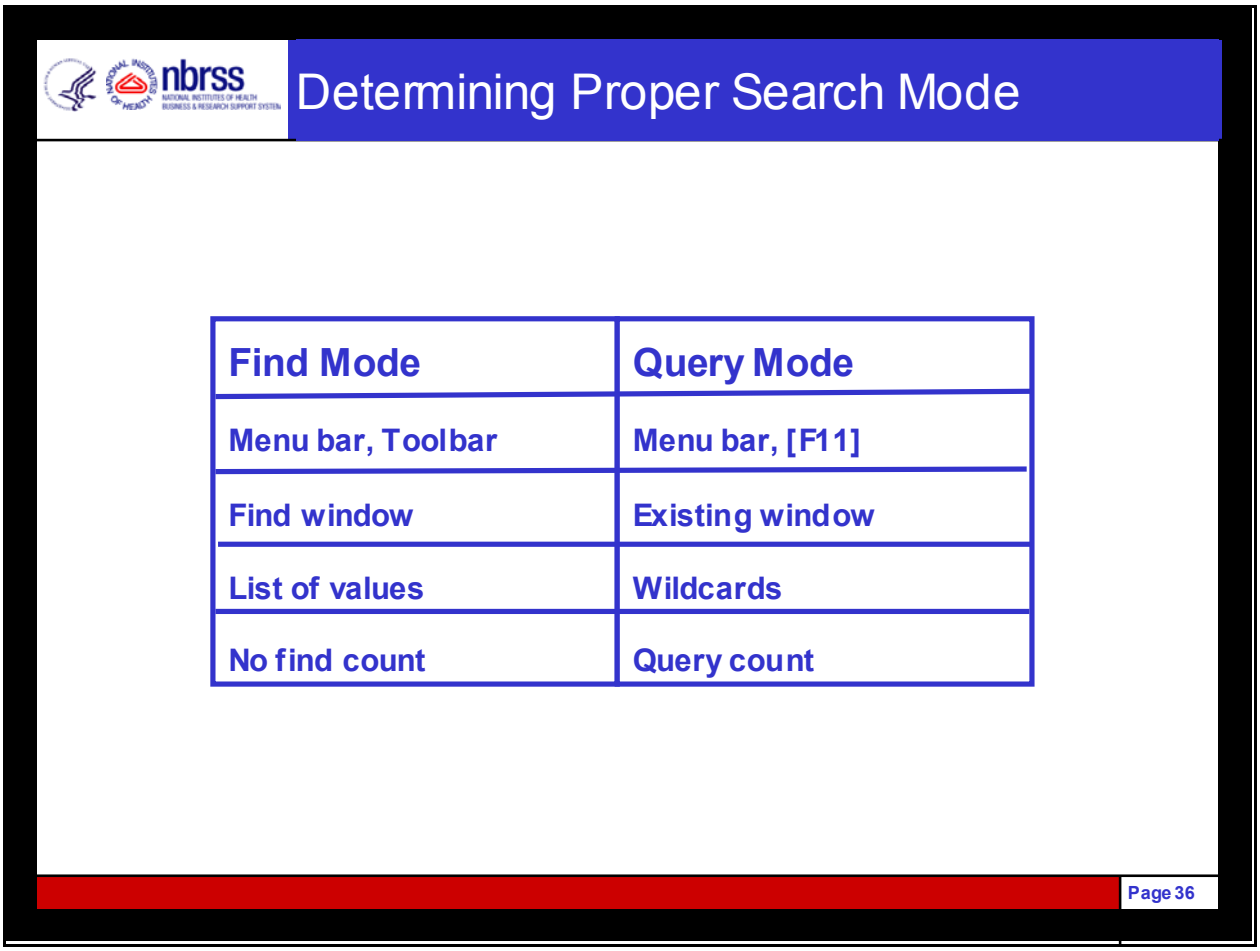

**Choosing a Date in the Calendar Window**

Values in a date field can be typed directly or you can use a calendar to enter a valid value in a date field if the field displays the **LOV** icon. If your date field supports time, you can also use the Calendar window to choose a valid time with the date.

1. Put your cursor in a date field.
2. Select the **LOV** icon to display the Calendar window. The date value that appears below the calendar is called the *selected date*, which is either the value already in the field, the default value of the field, or the current system date.
3. Select the date.

   Note: Disabled buttons that show dimmed text represent invalid days, which cannot be chosen. Similarly, if a date field is display only, you can display the Calendar window for the field, but you cannot change the date shown on the calendar.
4. Select **OK** to accept the selected date and close the window.
5. Select **Cancel** if you want to close the window without choosing a date.


nbrss
Searching for Data
After this lesson you should understand how to:
• Log into Oracle
• Use the Navigator
• Use forms and windows
• Enter data
➔ Locate data
• Run reports
• Log out of Oracle
Page 35




**Find Mode**

In Find mode, you use the menu bar to access the Find window, or you click the icon on the Toolbar.

You use a new window, the Find window, to prepare your search criteria.

The list of values is available in many fields in Find mode.

The Query Count feature is not available in Find mode.

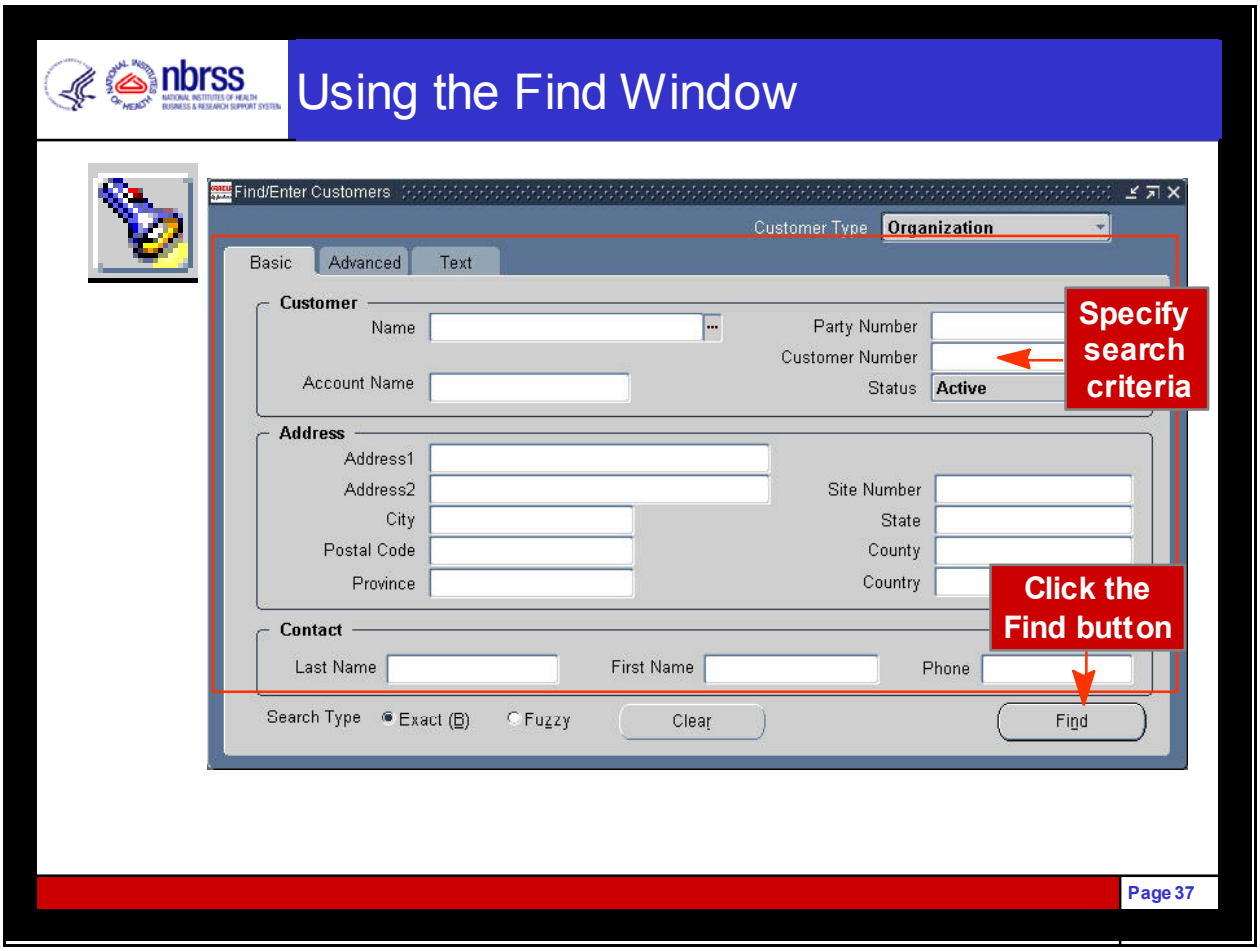
**Query Mode**

In Query mode, you can use the menu bar to access a query, or you can use keyboard shortcuts, [F11] to enter a query, and [Ctrl] + [F11] to execute a query.

You use the existing window to prepare your search criteria for the query. You can enter specific information into any field to narrow your search.

When using wildcards to prepare your search criteria, you can use all query operators to narrow your search.

In query mode, you can check to see how many records match your criteria even before retrieving the data that matches your query.

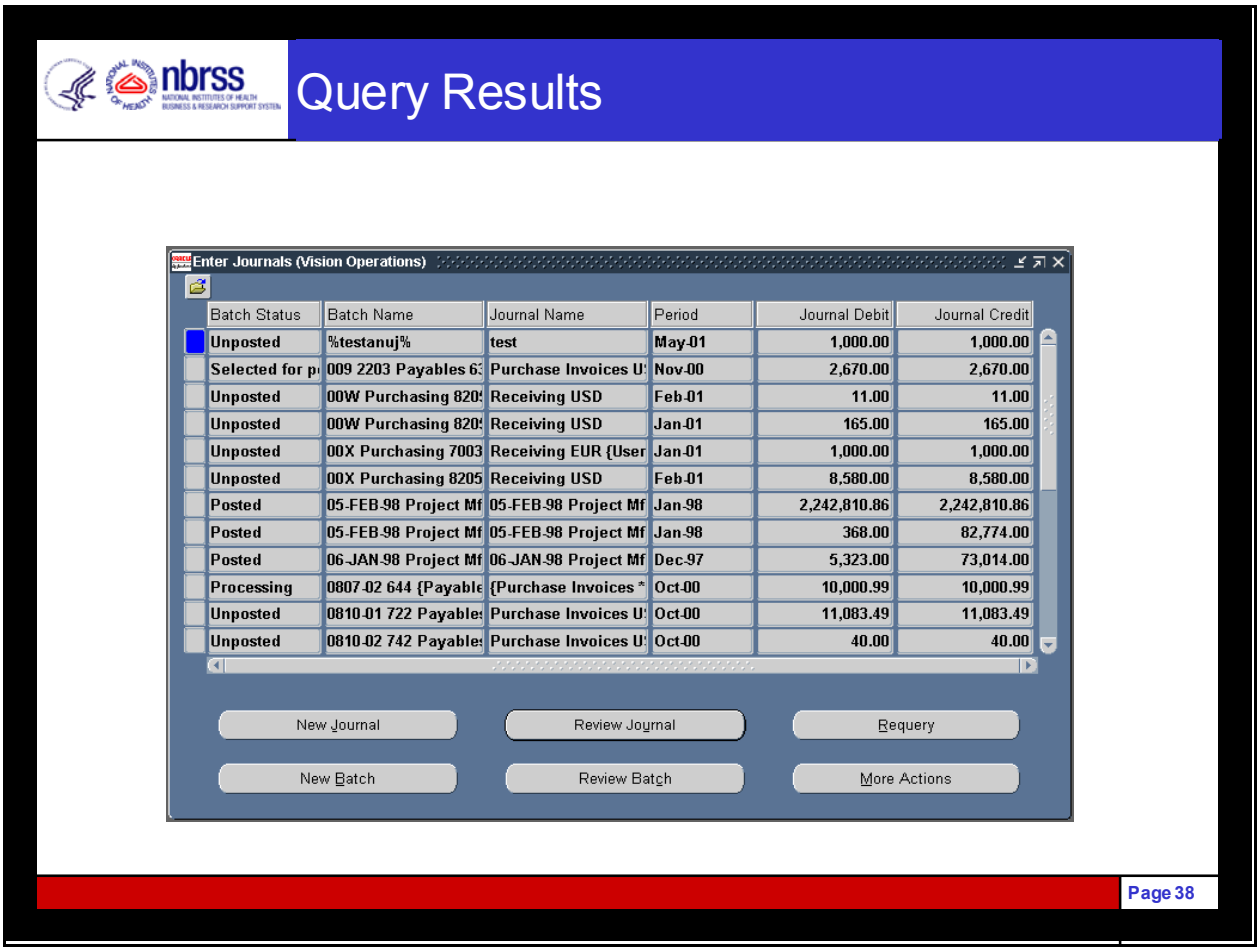



**Using the Find Window to Locate Existing Records**

1. (M) View > Find or click the **Find** icon on the toolbar.
2. Enter your search criteria in the appropriate fields of the **Find** window.

   If a field does not provide a list of values for you to choose from, you can enter wildcard characters (% and -) in the search phrase. You cannot, however, use query operators (such as >, <, and so on) in a Find window.
3. Select the **Find** button to find any matching records.
4. Select the **Clear** button to clear the current search criteria from the Find window so you can enter new search criteria.

In some forms, you may select the **New** button to enter a new record in your current block if your search finds no matching records. Not all windows support this.




**Reviewing Your Data**

After a search, Oracle Applications retrieves any records that matched your search criteria. Always enter the most selective search criteria that you can.

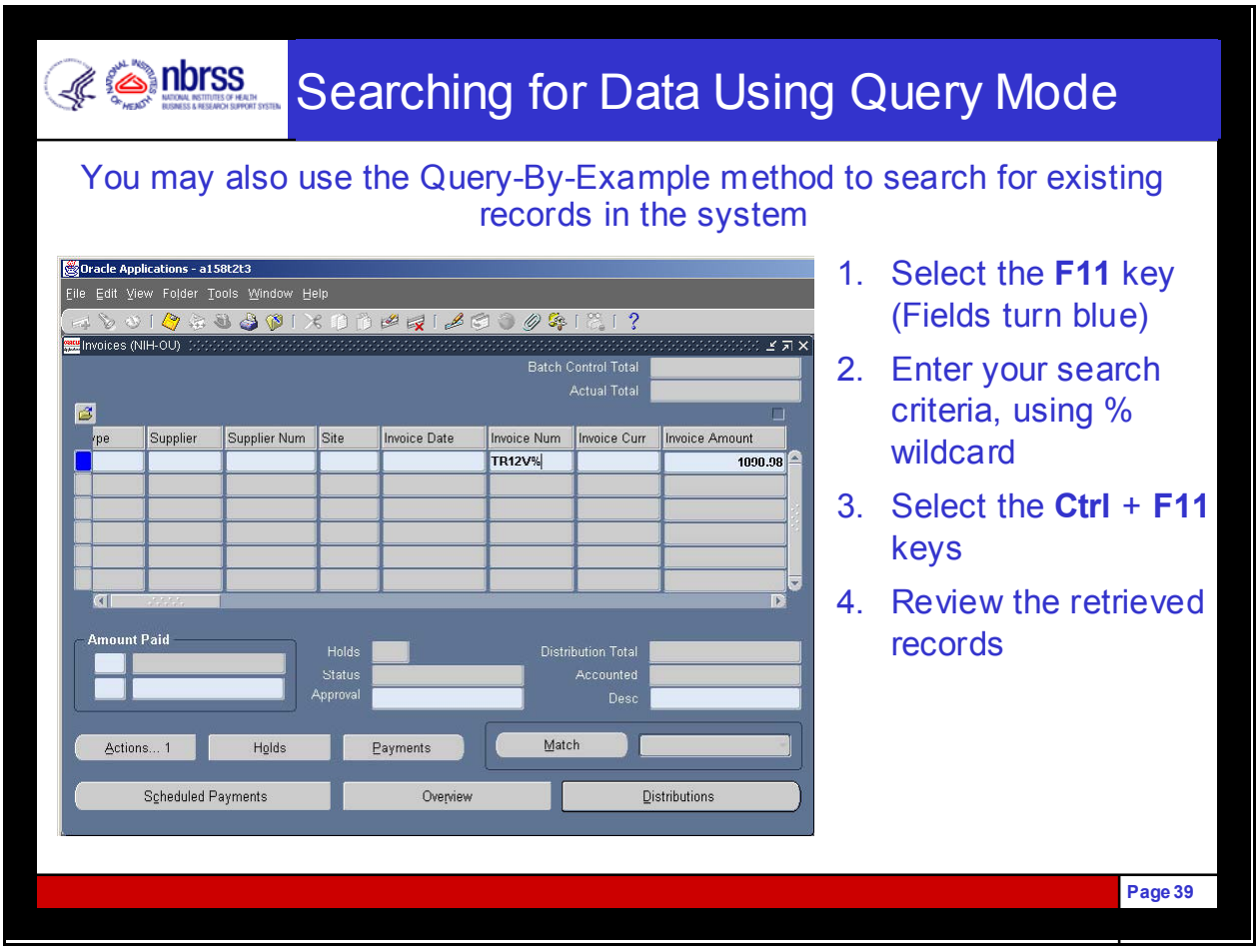
**How to Review Retrieved Records**

Use the scroll bar to view additional records currently not visible on the screen in a multirecord block.

(M) View > Record First to see the first record.

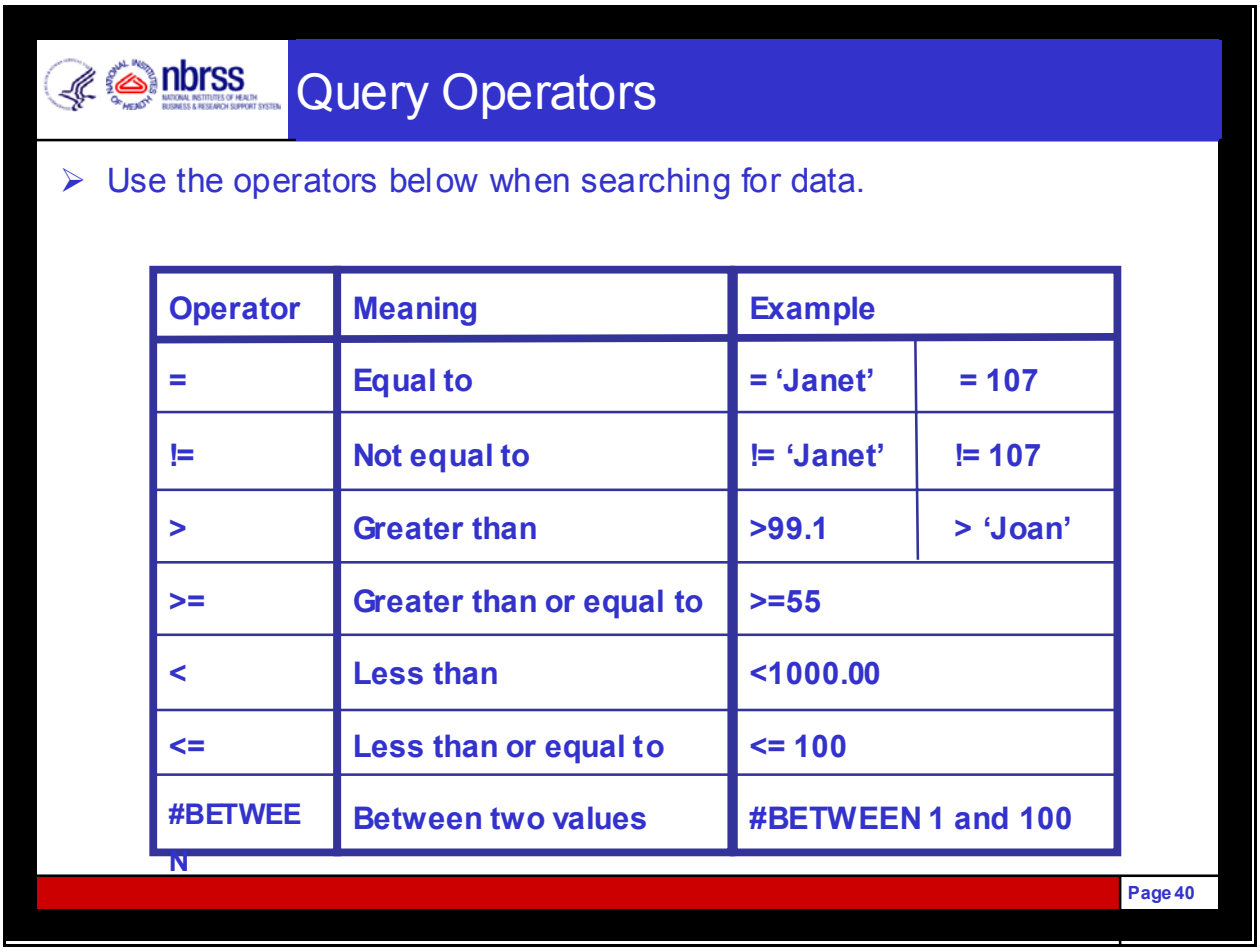
(M) View > Record Last to see the last record.

**Note:** Scrolling through records and using the Record Last command uses significant system resources. Avoid this by entering selective search criteria.



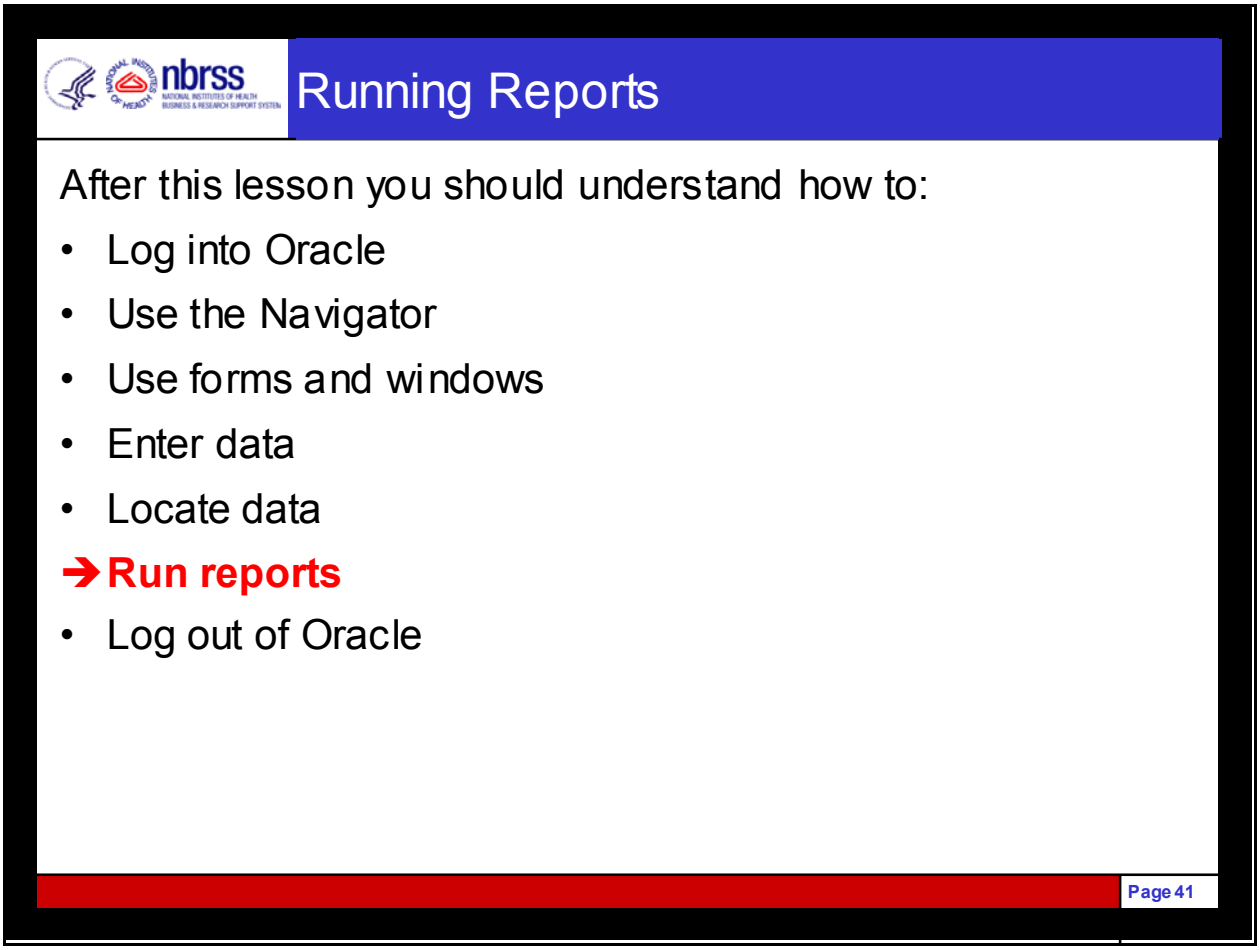

The Query Mode may be used in most forms. Using this method, you are able to search using the majority of the fields on the form, not just the ones that are listed on the **Find** window.

The method you use to search for data in the system depends greatly on the available fields on the **Find** window and your specific query criteria.




Using Query Operators and Wildcard Characters

You can use any of the query operators listed in the table shown in the slide. You can also use the percent "%" wildcard character to represent any character or group of characters. For example, use "Manuf%" to represent Manufacturing, Manufacturer, and so on. You can also use the underline "_" character to represent any single character. For example, "Product_" can represent ProductA, or Product1.


nbrss
Running Reports
After this lesson you should understand how to:
• Log into Oracle
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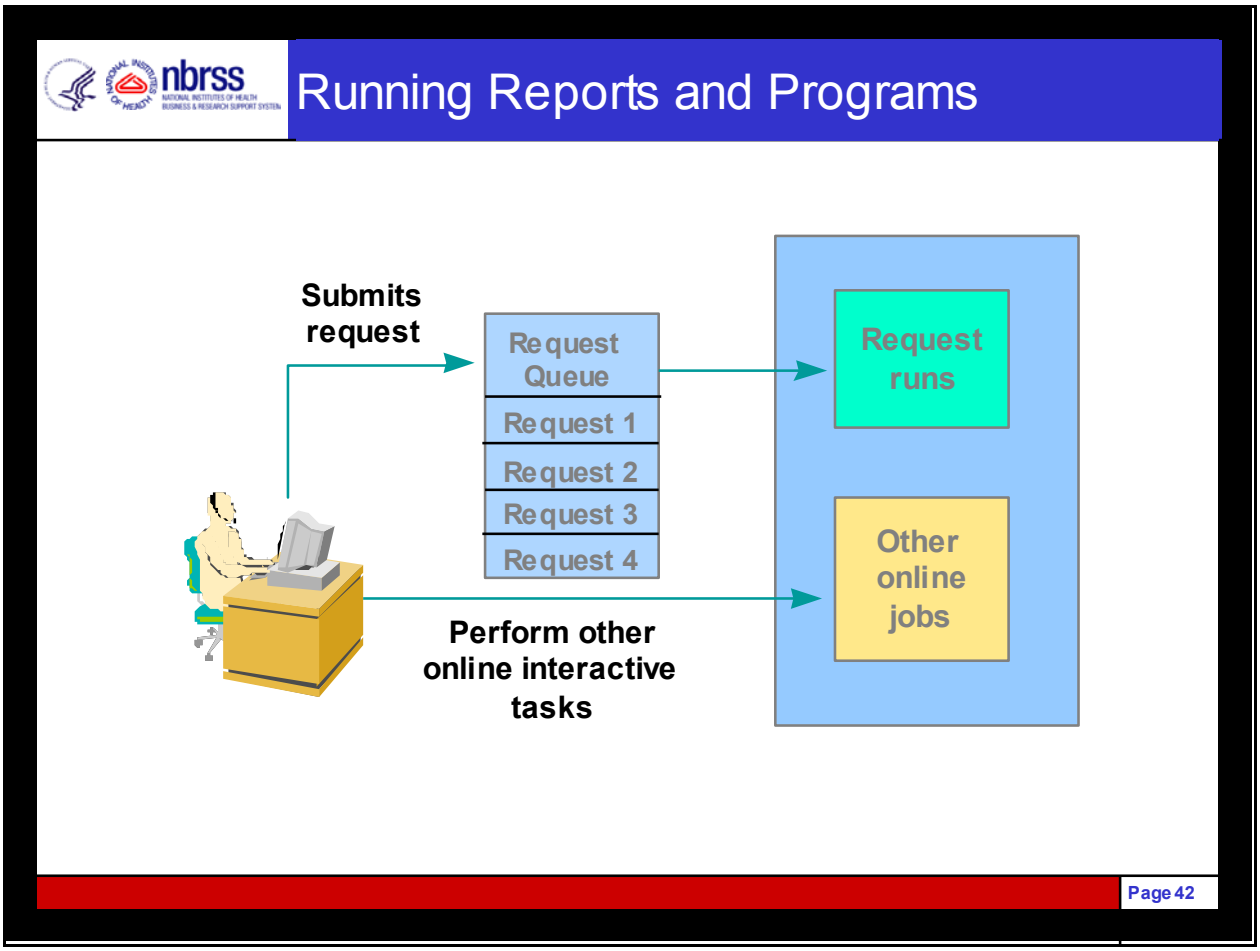
Page 41




**Running Reports and Programs**

**Concurrent processing helps you satisfy the following business needs:**

Continue working at your computer while running data-dependent reports and programs.

Fully use the capacity of your hardware by executing many application tasks at once.

Standard Request Submission lets you satisfy a related set of business needs. You can:

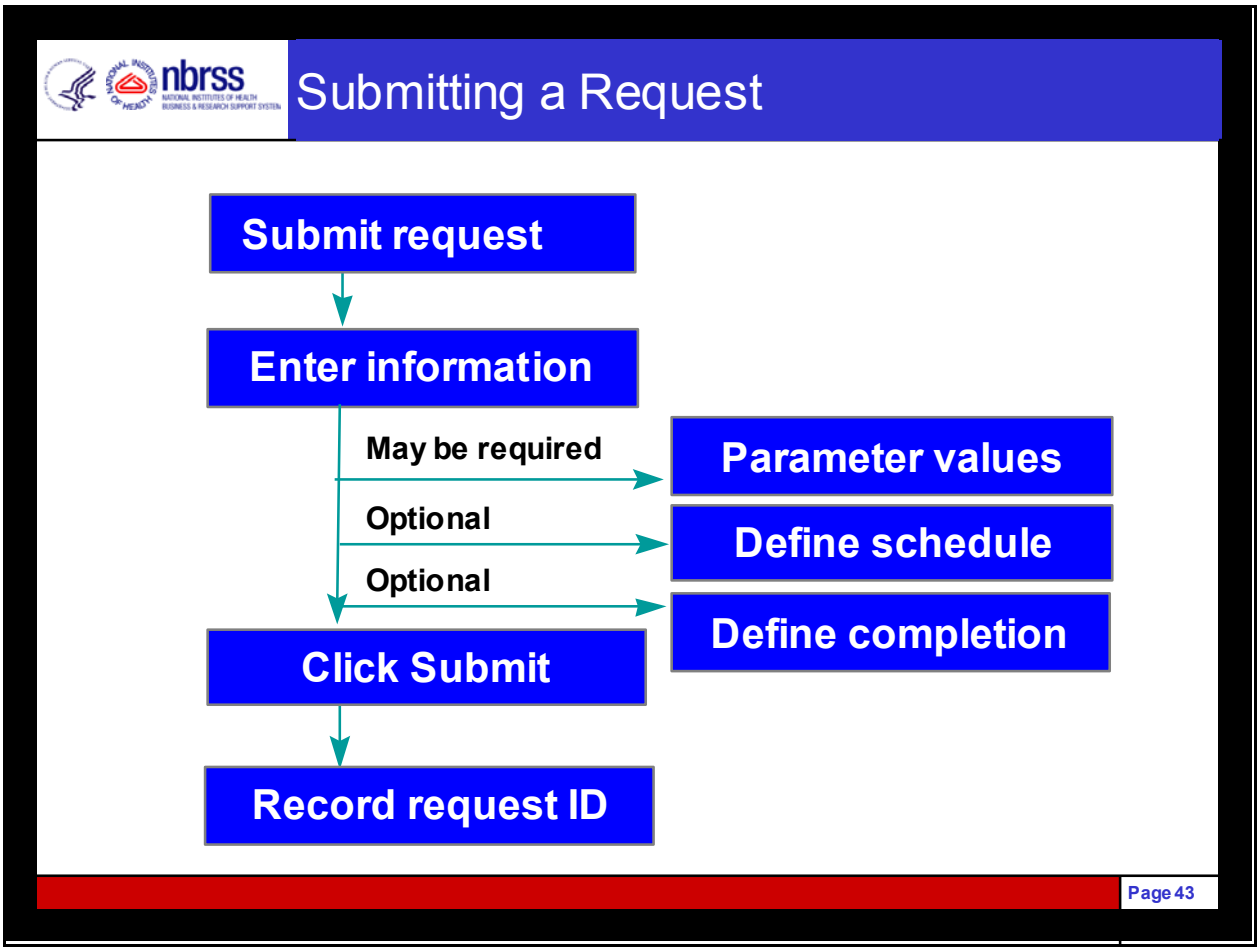
- Use a standard interface to run your programs and reports.
- Control access to different reports and programs.
- View report output online.
- Automatically run programs, reports, or request sets at specific time intervals.
- View a log file that summarizes the completion information about all the reports and programs in a request set

**Using Concurrent Processing**

You can run a noninteractive, data-dependent function such as a report or program, simultaneously with online operations. With concurrent processing, you can complete noninteractive tasks without interfering with the interactive work that you perform at your terminal.

An example of concurrent processing occurs when you use the Post Journals window in your Oracle General Ledger application. Once you specify the journal batches to post and click Post, your Oracle General Ledger application uses concurrent processing to post the journal batch entries without further involvement from you. Meanwhile, your terminal is still available for you to continue doing other work in Oracle Applications.

Oracle Applications runs all of its reports and programs as concurrent processes whether you submit them using the Submit Requests window, or using a product-specific submission window. Your system administrator can tailor concurrent processing to optimize the performance of Oracle Applications for you to ensure that your system is not overloaded with processing at any time.




**Using Standard Request Submission (SRS)**

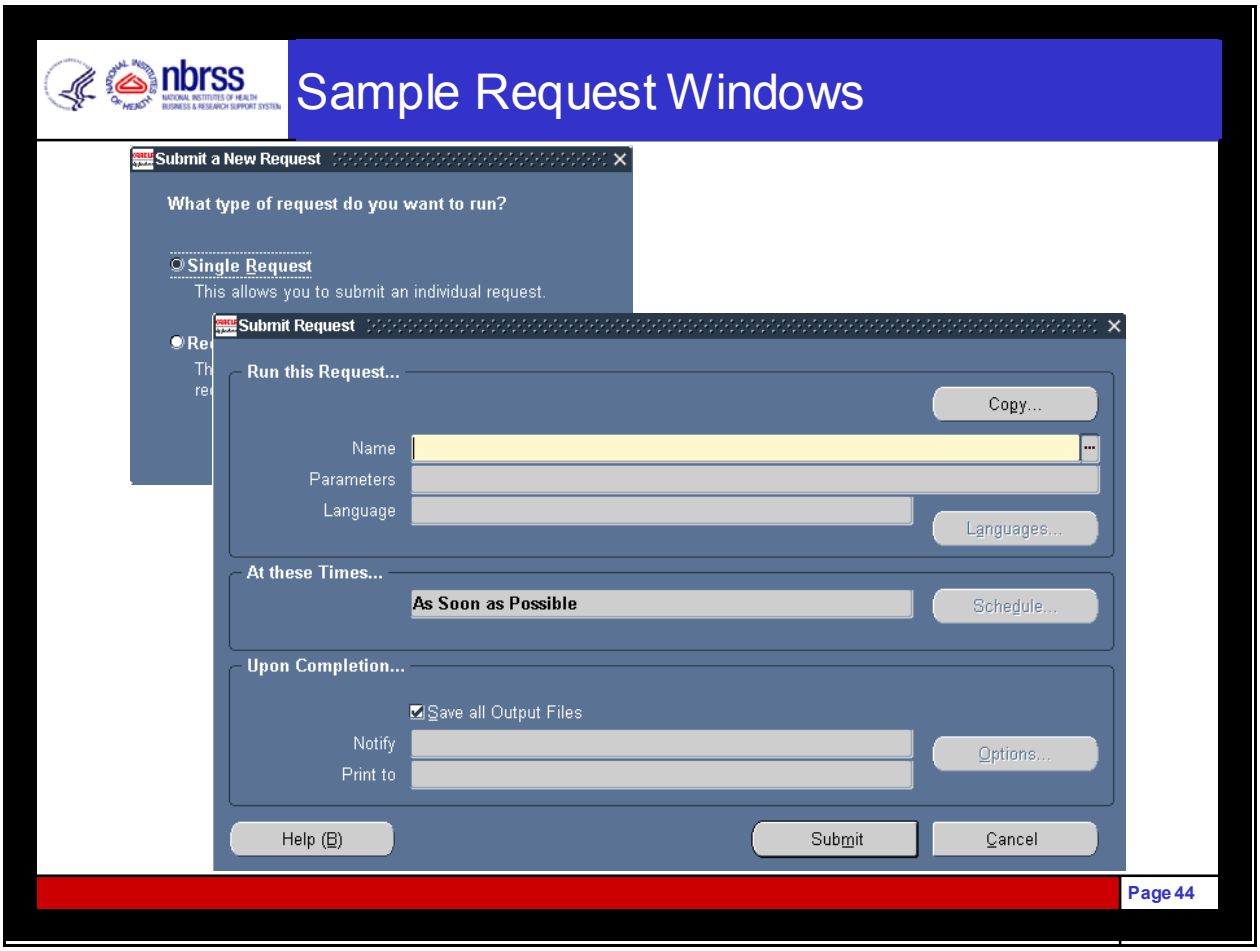
Using Standard Request Submission gives you control over how you can run your requests and request sets.

There are three elements involved in submitting a request: selecting the request or request set to be submitted, defining a submission schedule, and providing completion options.

Defining a schedule can be as simple as submitting "As Soon as Possible" or it can involve using a more complex schedule that you define when you first submit your request. The schedule may be used for other requests in the future.

Completion options enable you to deliver notification to others using Oracle Workflow, and specify which printers, and how many copies of the output you want to produce for each request.

You can submit as many requests as you like from the Submit Request window. You can even submit a request more than once if you want to run the same request with different parameter values.




**How To Submit a Request and Define Parameters**

1. Navigate to the **Submit a New Request** window.

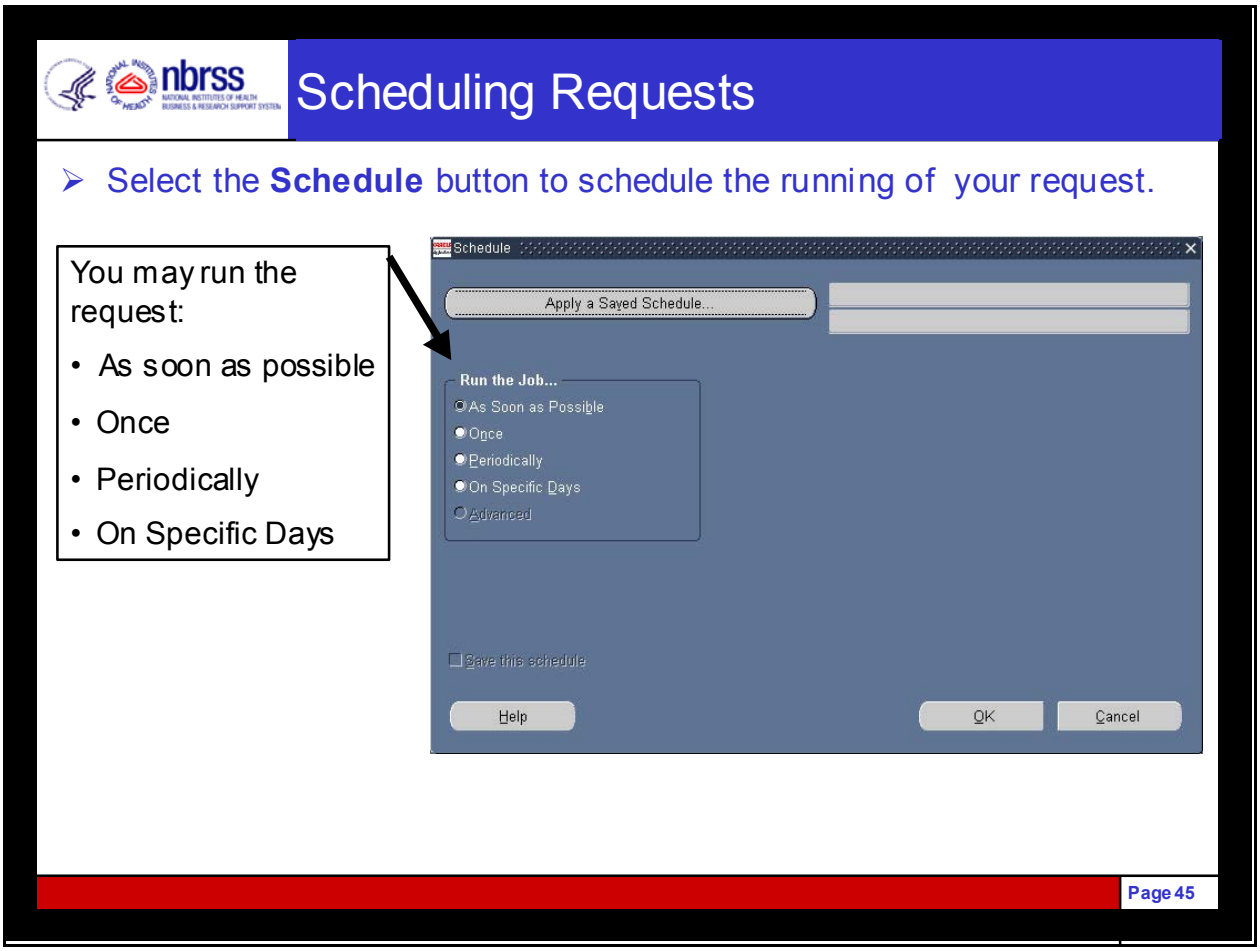
2. Check the Request option to submit single requests, or choose to submit a predefined group of requests by checking Request Set.

3. Click **OK**.

4. Use the **Copy** button to take advantage of previously entered request submissions. Or, select the Name of the request (report or program) that you want to run from the list of available requests. Note that the responsibility you are using determines the request group and the requests that will appear in the list.

5. A **Parameters** window automatically appears if you select a request that requires parameter values. The prompts in the Parameters window are specific to the request that you select.

6. Enter the values in the required parameter fields and click **OK**. The Parameters window closes, and your parameter values are concatenated and displayed in the Parameters window.




Defining a Submission Schedule

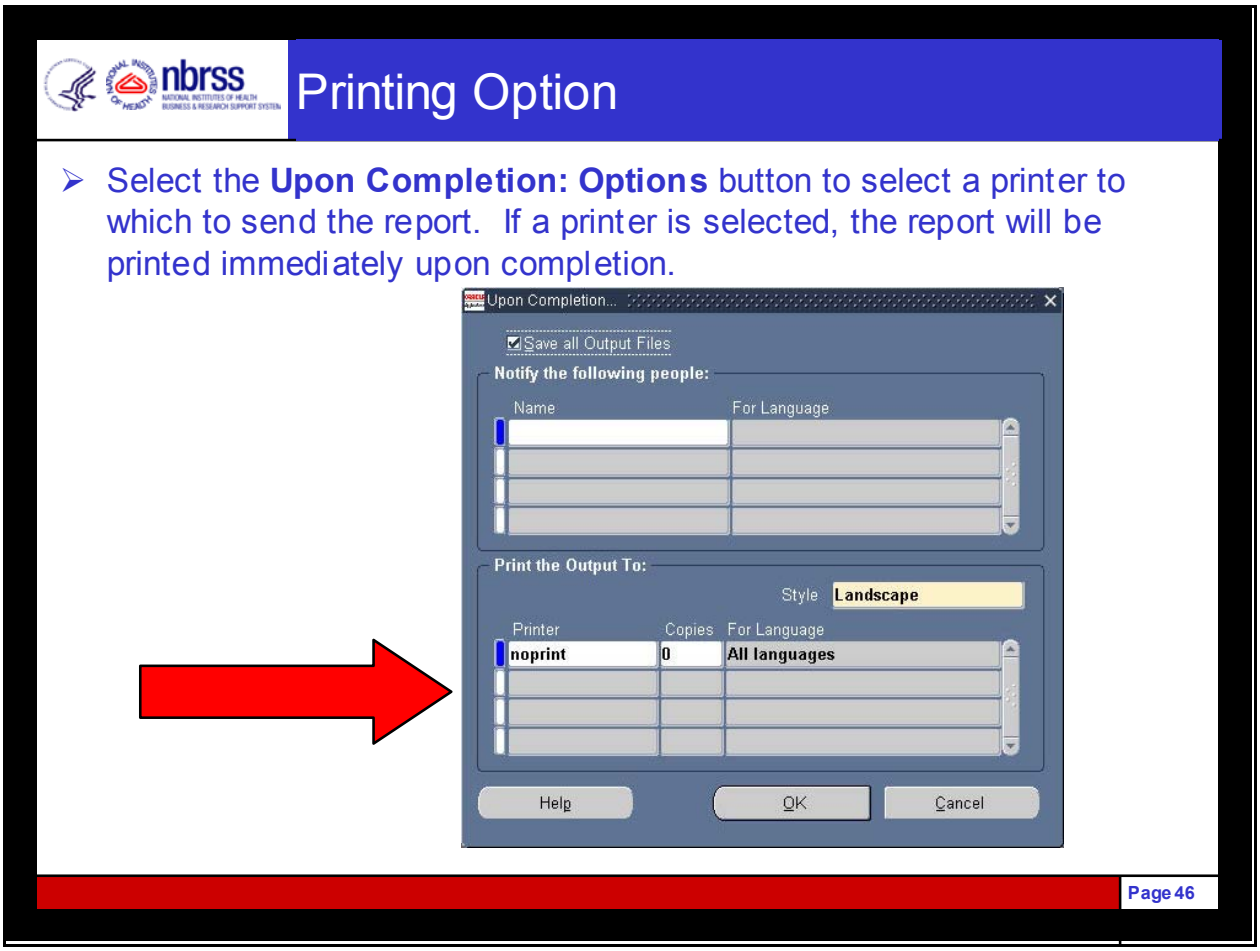
1. Click Schedule to open the Scheduling window.

   The scheduling window provides you with several scheduling options. You can choose to re-use a schedule you previously defined and saved, or define a new schedule. You can define your schedule to run a request as soon as possible, at a specific time, or repeatedly at specific intervals, on specific days of the week or month.

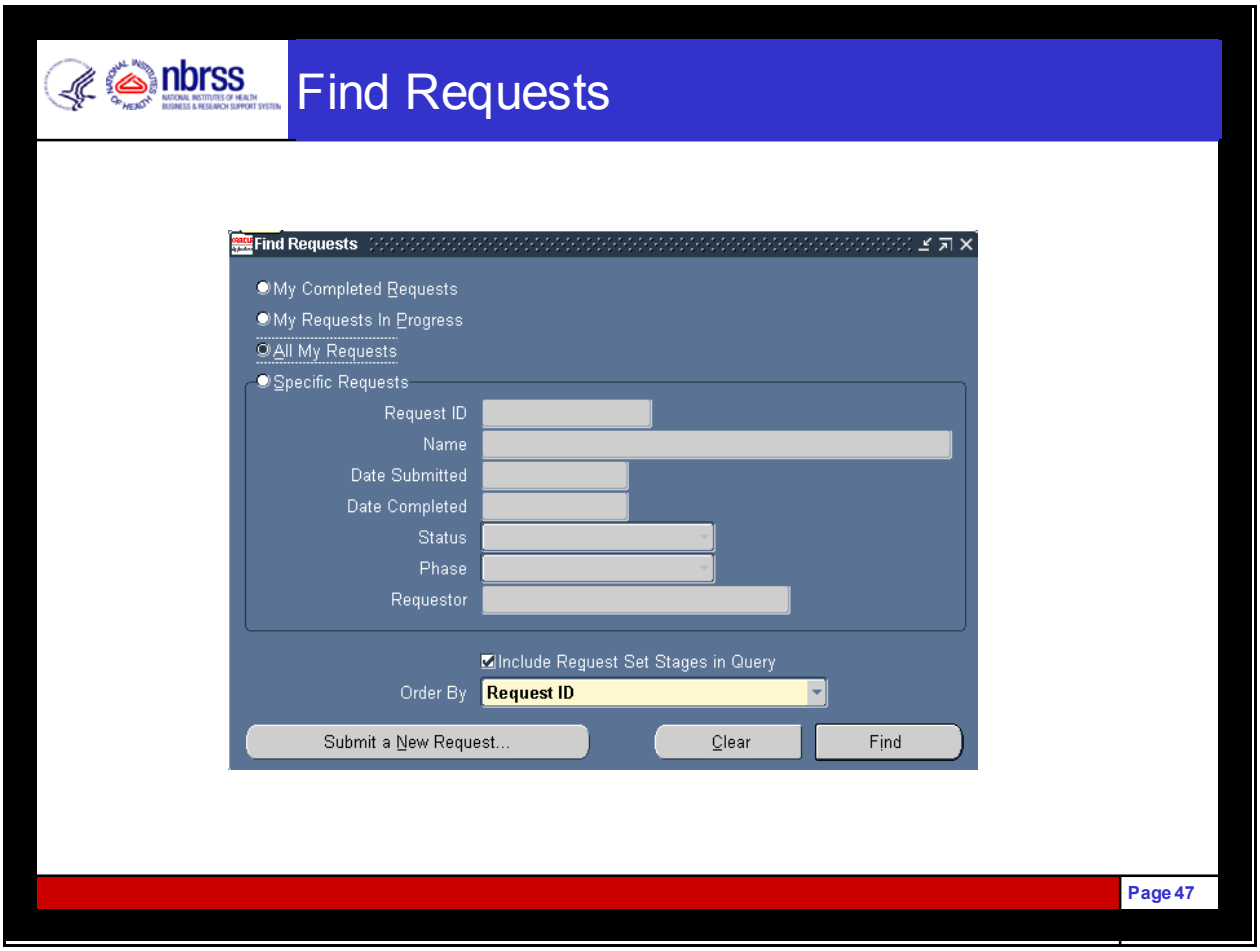
2. Choose a type of schedule.

3. To save your schedule, select the "Save this schedule for use again later" check box. You must also provide a unique name for each schedule you save, and you can provide additional information in the Description field.

4. Click OK. You are returned to the Submit Requests window.




Currently, the NIH is not using the **Notify** functionality. This functionality may be used upon the deployment of future tracks.




**Viewing Requests**

Since all reports, programs, and request sets are run as concurrent requests in Oracle Applications, you can navigate to the Request window to view the progress and output of all your concurrent requests, and you can change aspects of a request's processing options.

You can use the Request window (summary and detail) to view a list of all the submitted concurrent requests, check whether your request has run, change aspects of a request's processing options, diagnose errors, or find the position of your request in the queues of available concurrent managers.

**How to Use the Request Window**

1. Upon initial navigation to the Requests window, you are directed to the Find Requests window.

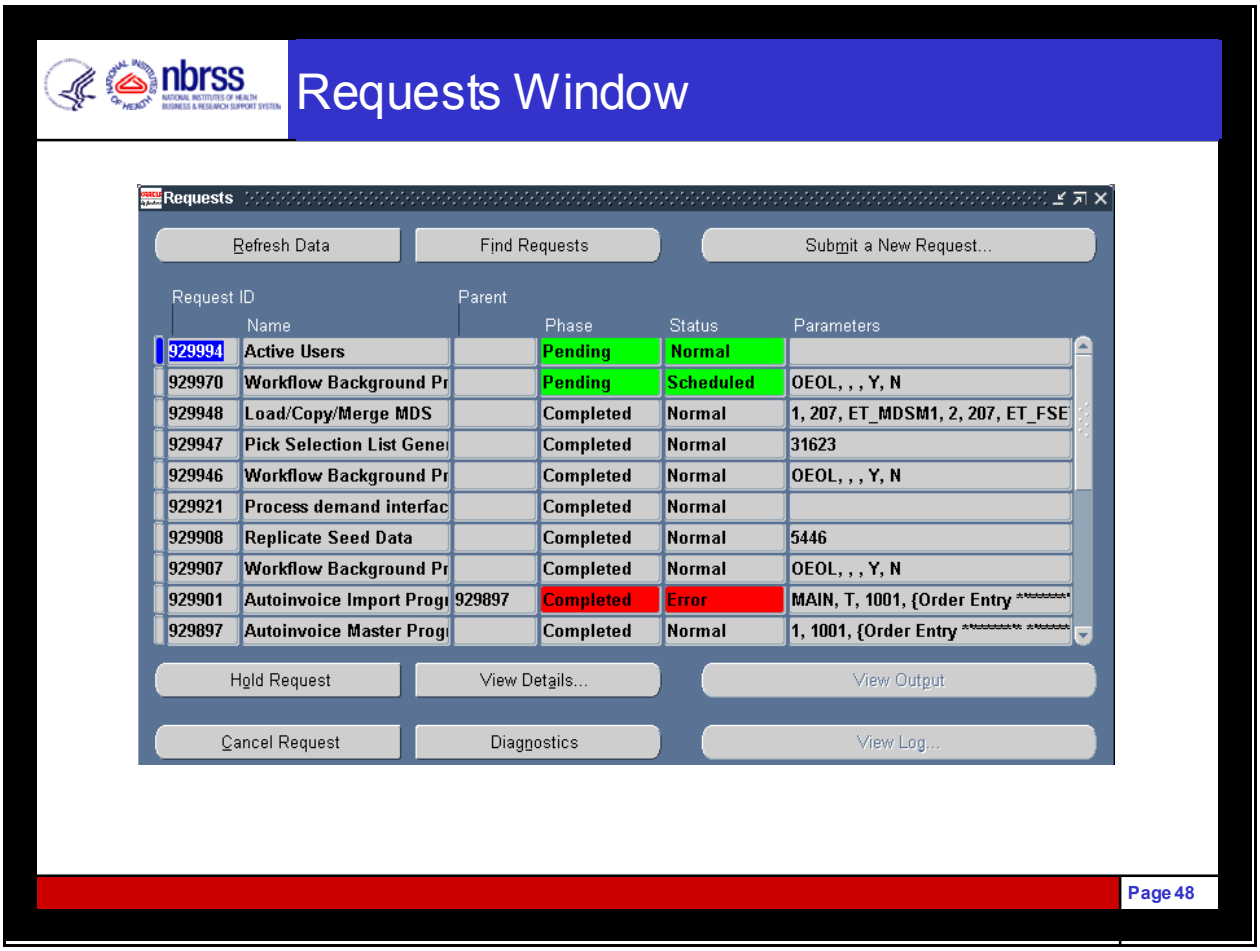
2. Use the Find Requests window to specify the types of requests you want to see. You can choose to view your completed requests, your requests in progress, or all of your requests by selecting the appropriate option group.

In addition, you can look for a particular request using the Specific Requests option group. Use the find criteria fields as you would for any other find window to specify as many or as few

details as you need to locate the desired request information. Navigate to the Find Request window.

3. Enter specific criteria in the Find window that appears, or click Find to display all of your requests that you have submitted.

4. Use the Order By poplist to specify the order in which you want your requests displayed.




**Performing Concurrent Processing Tasks**

You can click various buttons in this window to perform tasks relating to concurrent processing.

**Refresh Data**: The Requests window will not automatically refresh in order to display updated progress of your request. Use this button to requery the lines in the request table.

**Find Requests**: Displays the Find Request window to perform a search for additional requests

**Submit a New Request**: Displays the Submit Requests window to submit a new request to the concurrent manager

**Hold Request and Cancel Request**: These buttons illuminate if the concurrent manager has not already begun running the program. You can Hold or Cancel a request by using these buttons. If the request is already running the Cancel button will terminate the request.

**View Details**: Displays the Details window to view detailed information about your request, for example, submission dates, scheduling and other information. If a request has not already run, you can change selected fields so that the updated information will affect your request when it is run by the concurrent manager.

**Diagnostics**: Displays diagnostic information about your request such as when it ran and if it completed successfully.

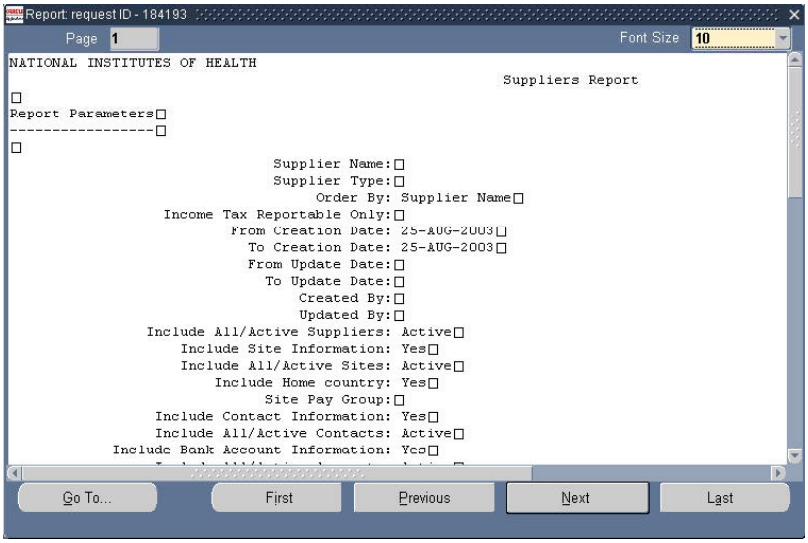
**View Output**: Displays an online format of your report.

**View Log**:  Displays the request log.


You must have your cursor in the line of the report that you want to reprint.

## Saving Reports to a File

- In the requests window, select the **View Output** button.
  - Result: The report is displayed in the **Report: Request ID…**window.

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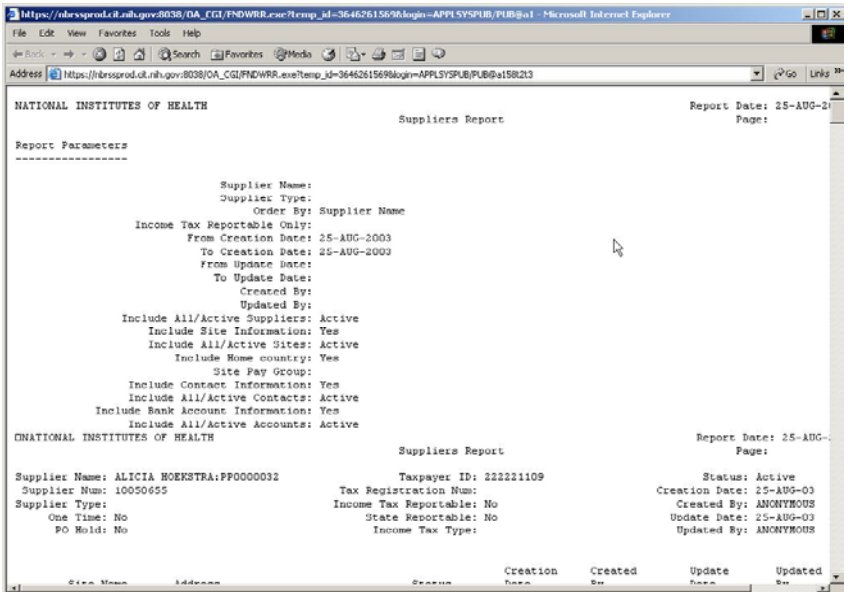
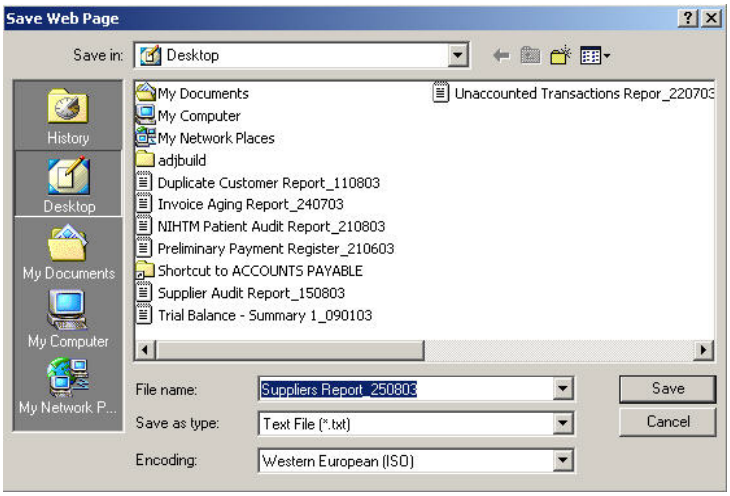
## Saving Reports to a File

- From the menu bar, select **Tools > Copy File**
  - Result: The report is displayed in a browser window.



## Saving Reports to a File

- From the menu bar, select **File > Save As**
  - Result: The Save As window is displayed.




- Select the location, type, and name of the file and select the **OK** button.

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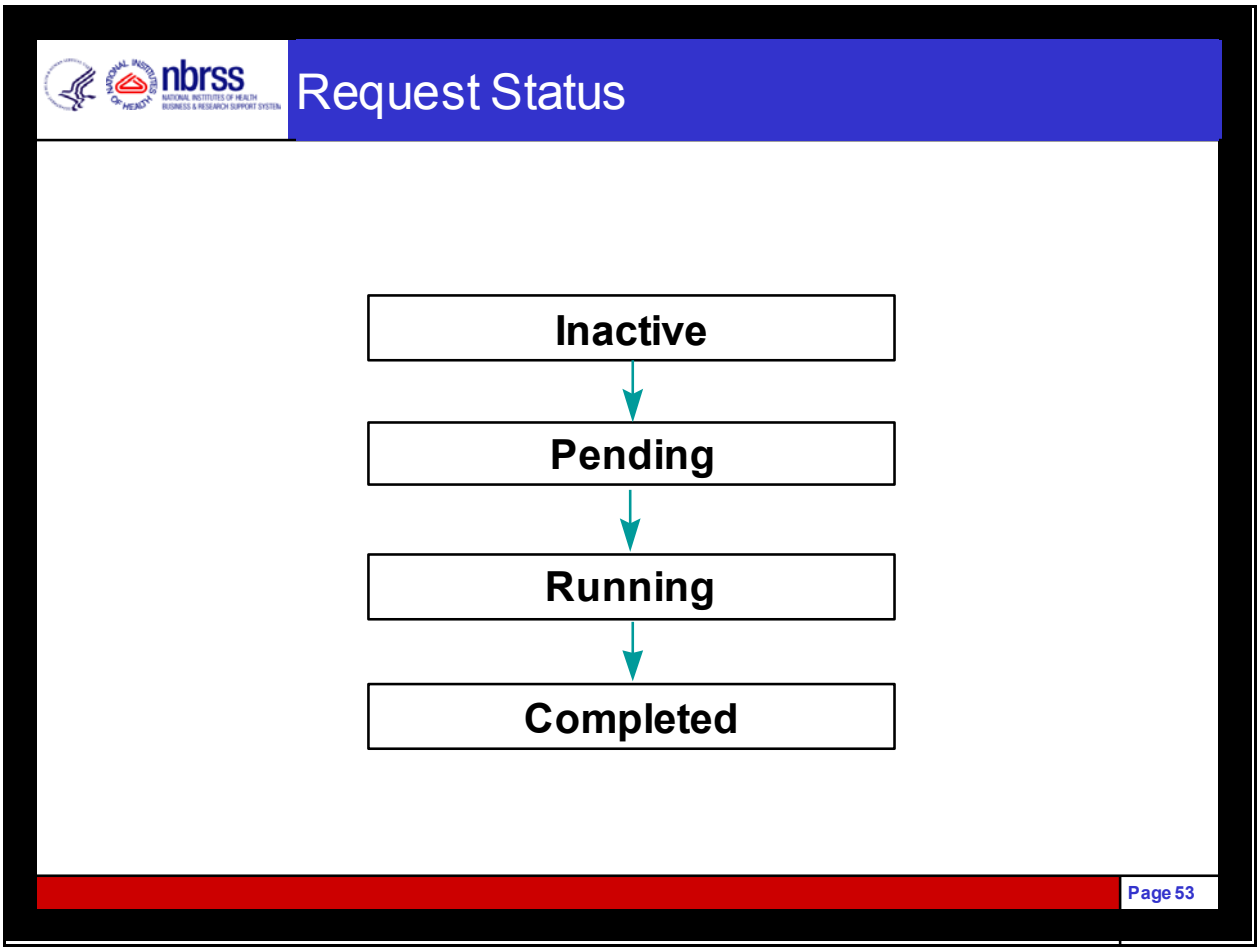



**Phase and Status for a Concurrent Request**

The Concurrent Requests Summary window displays a phase and status summary for each concurrent request listed in the window.

A concurrent request has a life cycle consisting of the following phases:

Inactive: The request cannot yet be run.

Pending: The request is waiting to be run.

Running: The request is running.

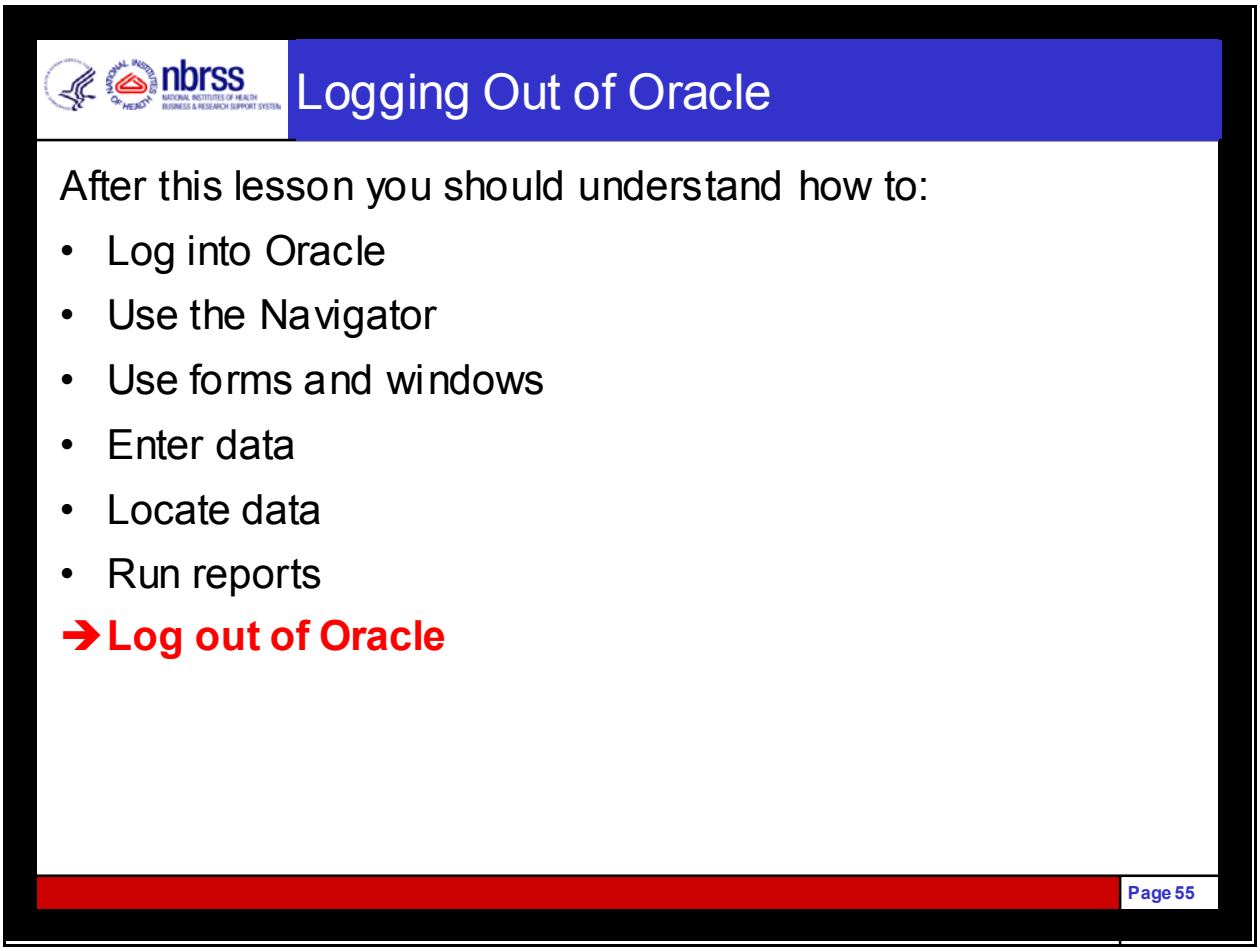
Completed: The request has finished execution.

During each phase, a concurrent request has a specific condition or status. The table lists each phase/status combination and describes its meaning in relation to a request.


Canceling or Holding a Request That Has Not Yet Completed

1. Navigate to the Requests window.
2. Select the Specific Request option button and enter the Request ID or other appropriate search criteria or select another appropriate option.
3. Click Find.
4. With the cursor on the request you want to cancel, click Cancel request. If the request is in Pending or Inactive phase, click Cancel Request or Hold Request to either cancel the request or put the request on hold. If the request is in Running phase, click Cancel Request to terminate the request.

   If you cancel a request set, then Oracle Applications will automatically cancel all requests in the set.
5. Choose Save from the File menu.


nbrss
Logging Out of Oracle
After this lesson you should understand how to:
• Log into Oracle
• Use the Navigator
• Use forms and windows
• Enter data
• Locate data
• Run reports
➔ Log out of Oracle
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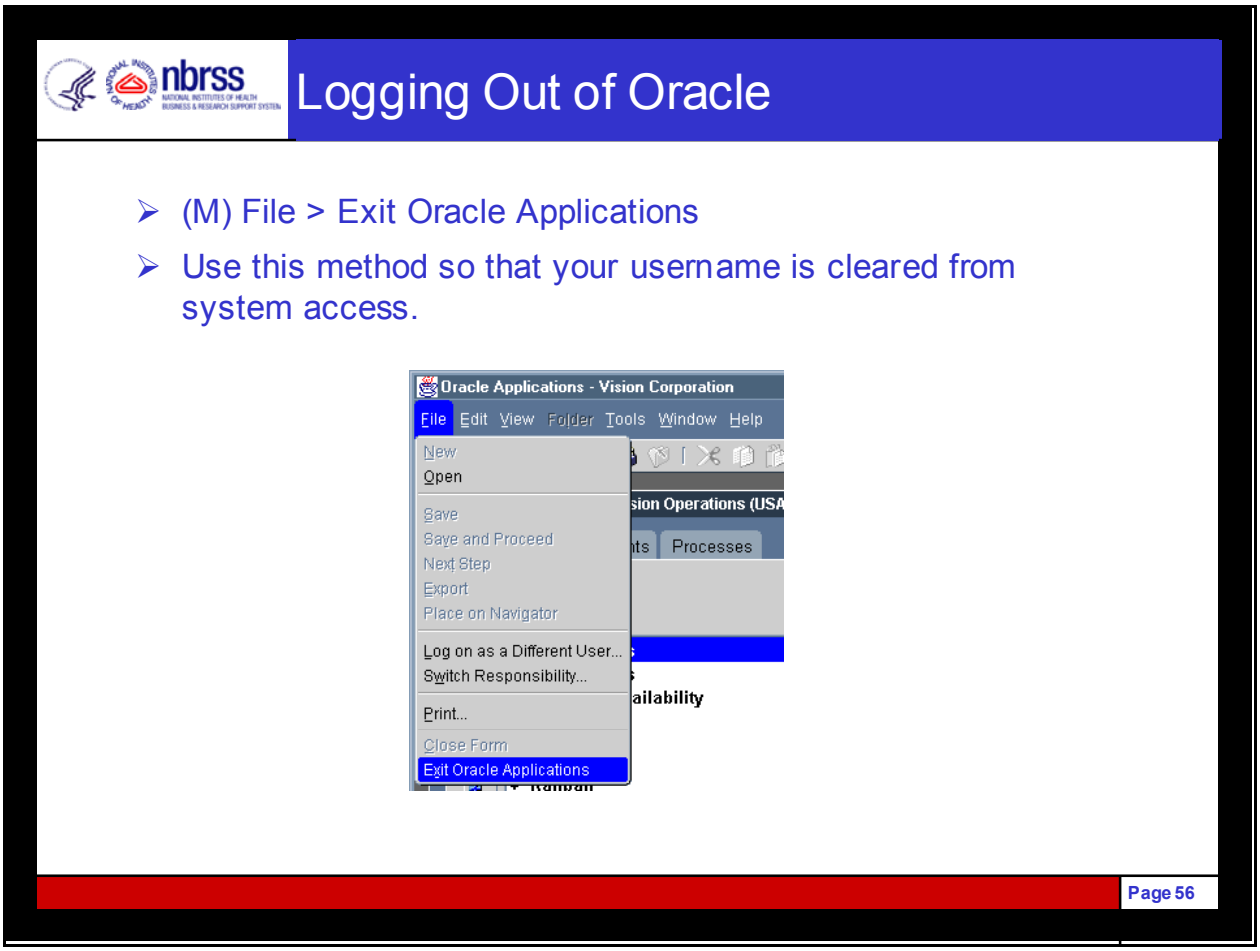
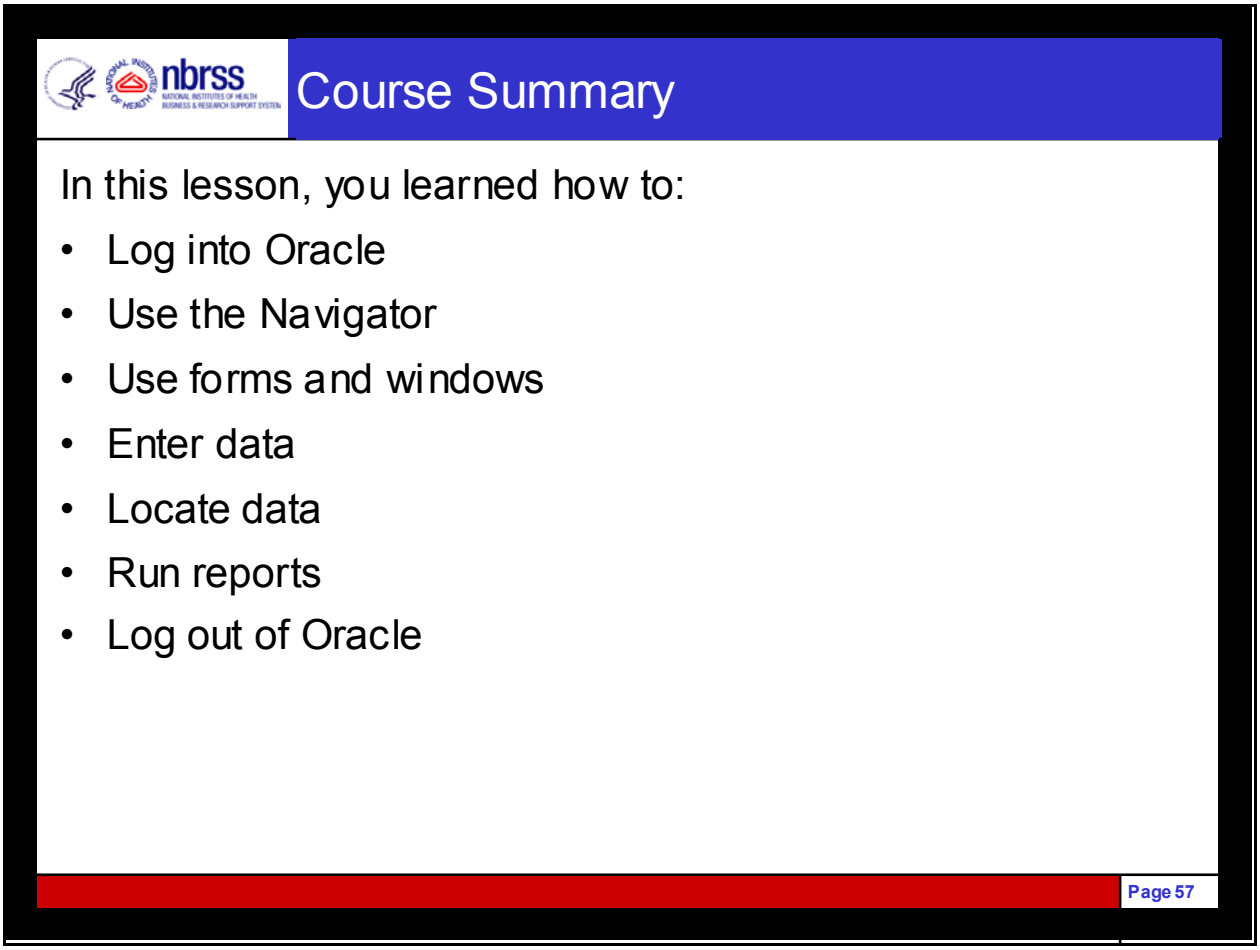



**Exiting Oracle Applications**

(M) File > Exit Oracle Applications, to log off the system. It is important to exit the system in this manner, rather than any other, as this is the only way to ensure that your user name is cleared from system access. You can also close the MDI window.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Course Summary
In this lesson, you learned how to:
• Log into Oracle
• Use the Navigator
• Use forms and windows
• Enter data
• Locate data
• Run reports
• Log out of Oracle
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